Job description

Job title: Wealth Management Administrator	
Main purpose of job: Reporting into the Senior Administrator the Wealth Management Administrator will support the Partners in a PA & back office administrative capacity, ensuring that the practice runs effectively on a daily basis from both an administrative and client perspective. Working in a small team, they will ultimately become one of the primary points of initial contact for incoming client communications, and deal with all non-technical queries into the office. The successful candidate will have exceptional organisational skills, and have the ability to put structure, practices and procedures in place to ensure the office runs as smoothly as possible. As a business who promote development from within, we are open to candidates who are looking to start a career in wealth management or are competent long-term administrators. We do also welcome applicants with prior experience working in a financial advice practice.	
Department: *Wealth Mgt*	**Location/Branch:** Silsoe, Bedford (MK45 4)
Position reports to: 2 x Chartered IFA's	**Position is responsible for:** no-one
Length of contract: Permanent – Full-time or Part-time	**Salary:** £20k-25k Depending on experience pro-rata

Main duties

The role is a hybrid role, consisting of PA / Administration / Client Servicing duties.

PA / Client Servicing

- Diary management – booking in existing and potential High Net Worth Client review meetings, plus all business-related appointments where required
- Daily management of emails and responding to any client servicing / day-to-day queries directly.
- Management and maintenance of client servicing proposition. Organising client gifts, greeting cards etc
- Managing all client actions on a task management system.
- Keeping all client details up to date
- Issuing of policy documentation to clients once an investment has been completed
- Liaising with internal administration centres regarding clients' funds and investments
- Partner Meeting pack preparation; preparing agenda's, obtaining up to date wealth accounts, illustrations, letters of authority
- Issuing final approved suitability letter to client

Administration

- Entering client details onto the internal systems.
- Keeping client policy information up to date
- Issuing letters of authority to providers
- Management of work in progress of all cases, and proactively moving cases along to completion
- Management of business pipeline to ensure Partner is paid when due
- Processing switches, withdrawals, via Partner
- Managing all stationery and office supplies
- Keep track of compliance, licencing, CPD, regulatory and legislative requirements, to ensure all deadlines are met

Technical requirements

- Submission of Electronic applications and creating advice sets
- Preparing a compliant CFR (Client Financial Review) for Partner / Paraplanner to prepare suitability reports
- High level of computer literacy, including Word, Excel, and Outlook.
- Basic suitability letter report writing (once trained)
- iBusiness, Salesforce, FE Analytics, Voyant, Opal (training provided on all of these areas)
- There is an opportunity for a candidate with prior experience to be able to assist with the writing of the Suitability Letters, although this is not an essential requirement.

Person specification

- Previous experience supporting a Financial Adviser in an administrative capacity is highly advantageous.
- Previous experience working in a financial environment required
- Focussed, calm and organised.
- Ability to influence outcomes and provide structure and guidance from an administrative perspective.
- Positive and self-motivated, with ability to work alone and on own initiative where required (when Partners or Senior Administrator are out of the office)
- Ability to adjust to last minute changes and respond effectively
- Flexible approach to workload and day to day requirements of the business
- Excellent attention to detail and a high level of natural numeracy
- Trustworthy and loyal, seeking long term commitment to the role
- Excellent telephone manner
- Comfortable taking the lead in an administrative capacity
- Knowledge of financial services desirable

Additional Information

- Location: Silsoe, Bedford (MK45 4) – This is currently a permanent office-based role.
- Full or part-time considered
- Days of work: Monday to Friday
- Start date: Immediately available role
- Salary: £20k-25k Depending on experience pro-rata
- Holiday entitlement: 22 days per annum, plus bank holidays.

For further details or to apply, please apply online

Wealth Management Administrator

We are currently recruiting for a Wealth Management Administrator to support two Financial Advisers (Partners) within a successful St. James's Place Wealth Management Practice based in Silsoe, Bedford.

The role is available on a full or part-time basis worked Monday to Friday.