



JOB PROFILE

Job title: IFA Administrator

Reporting to: Client Service Manager ("Line Manager")

KEY PURPOSE

To deliver flawless administrative services to enhance the overall client experience.

KEY RESPONSIBILITIES:

- Efficiently process all areas of customer service and administration.
- Respond to all customer enquiries within agreed time frame and in adherence with quality and compliance standards.
- Maintain client records (physical and electronic) in an orderly and comprehensive manner.
- Support new business development activities as required.
- Respond to ad hoc requests for administrative support by other teams across the business.
- Work with line manager to set and meet own performance objectives and deliverables on a regular and agreed basis.
- Undertake any training as required by the organisation in the fulfilment of role.
- Proactively take ownership of own professional development.
- Maintain a working knowledge of the technical resources provided by the Company.
- Maintain knowledge and awareness of the business objectives, the regulatory framework in which it works and compliance procedures.
- New business processing
- Managing and updating tasks on back-office system
- Submitting business to main investment platforms
- Processing 'Letters of authority'
- Chasing providers for outstanding information

- Answering the telephone
- Scanning and saving documents to back-office system
- Client and Provider liaison
- Client research and preparation for adviser meetings with clients
- Generating requests for information
- Sending letters to providers

SKILLS/COMPETENCIES

- Highly attentive to detail
- Numerate
- Previous customer service experience
- Good time management
- Excellent team player – collegiate, supportive, non-hierarchical
- Technical aptitude – able to use Microsoft Word and Excel
- Clear in written and spoken communications
- Good at listening and distilling information
- Well organised
- Flexible and open to change for improvement
- Professional in appearance and demeanour
- Have basic compliance knowledge and understanding of what makes a compliant file
- Have excellent organisational and prioritising skills
- Have excellent written and spoken communication skills
- Have good computer literacy and typing skills

EXPERIENCE

- Previous experience of working within the financial services industry is essential
- Have experience of using back office systems
- Have experience of using Platforms/Wraps
- Have knowledge of Pensions and Investments
- Experienced and competent IFA Administrator

BENEFITS

- A competitive salary package.
- Performance related bonus.
- 25 days annual leave, plus 1 day birthday holiday, plus discretionary Christmas break
- Pension scheme.
- Income protection
- Widow's Death in Service
- Life assurance
- Private medical insurance.
- Career progression opportunities within a growing and highly successful organisation.



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