

Job Title:	IFA Administrator
Purpose of Job	To support Financial Planners and ensure a smooth delivery of excellent client service and client communication, as per business processes.
Reports To:	Business Manager
Salary Range:	£23,000 - £28,000 depending on experience
Working Hours:	9-5pm Monday – Friday
Start Date:	Immediate Start Available

Why choose Jane Smith Financial Planning

We understand the right balance is needed when it comes to work and personal life. So, we do all we can to encourage a good work-life balance, currently working on a 60/40% split of office and home working, with potential for early Friday finishes. Couple this with a competitive salary and beneficial perks, we aim to ensure we support each other.

Benefits

- JS 25 days holiday (plus bank holidays)
- JS 3% employer pension contribution
- JS Health Cash back Scheme enrolment
- JS Training allowance / support towards qualifications
- JS Potential for bonus up to 10% of salary
- JS Potential for Hybrid working
- JS Potential for Friday early finishes

As a successful and award-winning chartered financial planning firm our ethos is to provide an independent financial planning service, building relationships that last a lifetime with both our clients and our staff. With a small but highly trained and qualified team, Jane Smith is looking for another individual that is enthusiastic, driven, extremely organised and thrives on a busy and challenging role keeping the best possible service and company standards.

The role of the Client Services Administrator is to deliver excellent customer service to your own group of clients and provide technical administrative support to the Paraplanners and Financial Planner. Experience as an administrator within the financial services industry is essential. A training and development programme is available to those who wish to progress further within the industry, please request our development roadmap.

To follow is a list of the key responsibilities and the skills needed to make this role a success.

Key Responsibilities & Accountabilities

Client servicing

- JS Provide a friendly and professional point of contact for clients and enquiries (by phone, email and in person)
- JS Organise existing and prospective client meetings and actively manage FP's Diary and workload
- JS Prepare client documentation in advance of and following client meetings (as per business processes)
- JS Manage client service needs and client expectations to ensure client satisfaction

- Liaise with other team members on work progress per client account and keep clients informed (as per business process)
- Liaise with clients on any administration queries they may have
- Assist in client meetings when required
- Ensure that relevant service components (as per client agreement) are delivered throughout the year in a timely manner
- Open and maintain client files to the required compliance standards
- Ensure action points resulting from client meetings get diarised and dealt with

Client administration

- Check accuracy and completeness of new business documentation
- Ensure that all business applications are processed accurately and efficiently, in a compliant manner to the firm's standards
- Ensure all supporting documentation is maintained as per company procedures
- Liaise with product providers to ensure timely and accurate responses to clients (progress chasing)
- Send Letters of Authority and gather accurate information as per business process
- Obtain illustrations and application forms
- Produce portfolio valuations
- Ensure fund top ups, withdrawals, switches, and rebalances are carried out accurately and within company timescales

Reviews

- Organise client review meetings as per Annual Review Process
- Prepare paperwork required for the reviews as per Annual Review Process
- Support FPs in the delivery of reviews, if needed
- Ensure implementation of agreed actions

General administration

- Ensure back-office systems are kept up to date
- Filter FP's general information, queries, phone calls and invitations
- Open, scan, log and allocate incoming post when needed
- Other duties as directed by management

HOW TO APPLY

Please provide a copy of your C.V along with a covering letter on email to leanne@janesmithfinancial.com detailing why you would be suitable for the role along with your salary expectations.

Also be aware that some pre-employment background and credit checks will be required for this role.