UNCOVER
Your Business Potential

Job Description: Administrator

FP*advance*

Job Description: Administrator

Job Title: Administrator

Purpose Of Job: To provide administrative support in all aspects of day-to-day running of the business

Reports To: Operational Director/Practice Manager

Key Responsibilities & Accountabilities:

Business Processing

- Check accuracy and completeness of new business documentation
- Ensure that all business applications are processed accurately and efficiently, in a compliant manner to the firms standards
- Ensure all supporting documentation is maintained as per company procedures
- Record fees
- Ensure all work is followed up promptly in line with company standards
- Liaise with product providers to ensure timely and accurate responses to clients (progress chasing)
- Send letters of authority and gather accurate information
- Obtain illustrations and application forms
- Production of portfolio valuations
- Ensure fund switches / rebalances are carried out accurately and within company timescales

Client Servicing

- Provide friendly and professional point of contact for clients and enquiries
- Create and maintain accurate client records on back office systems, platforms and any other IT systems e.g. cashflow & risk profiler
- Prepare client documentation and correspondence pre and post meetings as per business processes
- Ensure action points resulting from client meetings get diarised and dealt with
- Organise and diarise client meetings
- Ensure that relevant service standards are delivered throughout the year

Reviews

- Organise client review meetings as per Annual Review Process
- Prepare client review documentation as per the Annual Review Process
- Support FPs in delivery of reviews
- Assist in implementation of agreed action points

General administration

- Answering the telephone
- 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
- General correspondence
- Other duties as directed by management

Job Description: Administrator

Personal Specification:

Job Title: Administrator

Criteria:	E or D
Knowledge	
Microsoft Word, Excel and electronic diary management	E
Financial Services back office systems	D
Advanced Excel	D
Knowledge of Financial Services Products	E
SKILLS	
Interpersonal skills to develop and maintain client trust and inspire confidence	E
Able to communicate effectively in verbal and written form	E
Highly organised, methodical and disciplined	E
Shows initiative and takes personal responsibility for completing tasks	E
Able to work within defined business processes	E
Adopts a positive attitude, willing to assist others when busy	E
Able to work under pressure on occasions to achieve deadlines	E
Attention to detail	E
Able to achieve agreed outcomes without supervision	E
Able to prioritise and plan workload	E
EXPERIENCE	
At least 2 years experience working as an administrator	D
At least 2 years working within a financial planning environment	E
QUALIFICATIONS	
Certificate in Financial Planning or equivalent	D

D= Desirable E= Essential