UNC OVE R



*Job Description:*

*Junior Administrator*



# Job Description: Junior Administrator

***Job Title:*** Junior Administrator

***Purpose Of Job:*** To be the first point of contact for the company and to provide administrative support across the organisation.

***Reports To:*** Practice Manger

## Key Responsibilities & Accountabilities:

* Answering the phone
* Meeting and greeting clients and other business visitors
* Invoicing
* Sending letters of authority and chasers as per Advice Process
* Typing if required
* Keeping back-office systems up-to-date with relevant information
* Opening, scanning, logging and allocating incoming post
* Scanning and filling
* General office maintenance
* Keeping meeting rooms clean, tidy and stocked
* Arranging additional facilities needed for client meetings (e.g. sandwiches, making lunch bookings)
* Managing post if admin staff are sick or on holiday to ensure that essential work is dealt with
* Ordering and maintaining adequate stationery levels
* Ordering and maintaining general supplies for kitchen and office
* Assistance with general administrative tasks
* Maintenance of the Client Birthday Card List and organisation of timely posting of cards
* Other duties as directed by management

# Job Description: Financial Planner

## Personal Specification:

***Job Title:*** Financial Planner

***Criteria:*** E or D

## Knowledge

Microsoft Word, Excel and electronic diary management E

## Skills

Excellent interpersonal skills E

Excellent communicator E

Shows initiative and takes personal responsibility for completing tasks E Highly organised and disciplined E

Adopts a positive attitude, willing to assist others E D= Desirable E= Essential