



Job Description: Junior Administrator

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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 filing
- 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