UNC OVE R



*Job Description: Practice Manager*



***Job Title:*** Practice Manager

***Purpose Of Job:*** To act as an integrator between the Visionary and the rest of the team and to drive the business as per the agreed Business Plan.

***Reports To:*** Managing Director

***Key Responsibilities & Accountabilities:***

# Processes & Procedures

* Create internal service standards, business processes and procedures
* Ensure all business service activities comply with relevant acts, legal & regulator requirements and ethical standards
* Review business policies, processes and procedures in relation to the efficiency of staff performance
* Overseeing the delivery of all general office and business administration, ensuring all legislative and business requirements are met
* Ensure that all business activities are performed in a timely and efficient manner

# IT

* Manage all IT services and systems with help of external consultants
* Monitor all IT systems to ensure their optimal usage
* Keep an up-to-date register of hardware, software and staff passwords

# Human Resources

* Manage the team and their workload to achieve set business goals
* Arrange employment of new staff and terminations /resignations of existing staff
* Create and review organisation structure and roles on an ongoing basis
* Establish performance objectives and training and development plans for all staff members and review twice per year
* Coordinate training for all staff as per their career plans

# Compliance & Finance

* Develop and document accounting policies and procedures for the business
* Direct the general accounting functions and prepare the following reports for the MD: Annual Budget, Annual P&L, and Annual Balance Sheet
* Prepare financial statements and forecasts for the business
* Organise and collaborate with external auditors to prepare quarterly management accounts and audit of accounting records each year
* Ensure that all business activities are in line with the FCA requirements and submit RMAR returns

# Marketing

* Establish and coordinate marketing plans, objectives, policies and programmes within the context of the overall Business Plan, including setting targets and pricing structures
* Direct and coordinate marketing activities as per Calendar of Events, Annual Marketing Plan and other directives as per management decisions
* Appraise success of marketing activities in relation to the overall marketing strategy

## Personal Specification:

***Job Title:*** Practice Manager

***Criteria:*** E or D

## Knowledge

Microsoft Word, Excel and electronic diary management E

Advanced Excel D

Excellent knowledge and understanding of the Financial Services Industry E Excellent knowledge of legal and compliance requirements relevant to the role E Good knowledge and understanding of broad principles and issues concerning Human Resources Management E

## Skills

Highly organised, methodical, analytical and disciplined E

Excellent communicator (both verbal & written) E

Highly numerate E

Adopts a positive attitude, willing to assist others when busy E

Able to work under pressure E

Excellent attention to detail E

Excellent ability to prioritise and plan workload E Proven capability in marketing, client servicing, and business development E Innovative and creative thinker E

Excellent team management ability E

## Experience

At least 3 years relevant industry experience E

At least 3 years working within a financial planning environment E

3-5 years marketing and finance management experience D

3-5 years of team management experience desired D

## Qualifications

Certificate in Financial Planning or equivalent D BSc in Economics, Mathematics, Physics, Business or a related discipline (min 2:1) D

D= Desirable E= Essential