Financial Planning Administrator

Location: Poole, Dorset (BH14)

Salary: Salary dependant on experience and qualifications

Position: Full-time

If you're a great employee, looking for an exciting new role at a Company with great values – read on!

We're genuine lifestyle, financial planners that have a significant, positive impact on people's lives. We don't talk about putting clients first, putting the client at the centre of every decision is just part of our DNA. It's just how we do business.

We do exciting work - which means our team gets to do exciting work too. The clients we attract are well above average, with enough technical complexity to make them interesting.

We're looking for an experienced Financial Planning Administrator to join our team, based in our lovely office near Poole. If you can consistently deliver excellent client service, want to make a difference and achieve the high standards expected by our client's, let's have a chat.

You need to be a professional, articulate individual who enjoys building relationships and can be confident and enthusiastic about our ethos and goals.

We've got a great team already - and we're looking for one more. The people already working here are A-players, we deliver the unexpected, unexpectedly well. They love their work and love working collaboratively with other people who share these characteristics.

The successful candidate will receive a competitive salary and benefits package as well an opportunity to work as a key member of our team. Driven and ambitious individuals will receive ongoing, paid for, training to support their career.

Your Key Responsibilities

- Provide friendly and professional point of contact for all clients (by phone, email and in person)
- Organise and prepare paperwork for client Planning Meetings including a statement of value added. Following the meeting, prepare a summary to send to clients
- The ideal candidate will be able to write Recommendation Reports having agreed the strategy for the client with the Financial Planner
- Support the Financial Planners with administration tasks including preparing forms, liaising with providers and other tasks as required
- Prepare client documentation such as illustrations, valuations and application forms, ensuring that all follow-up actions are dealt with efficiently and accurately
- Ensure that all new business applications are processed accurately and efficiently, and that all supporting documentation is retained as per processes
- Ensure service standards are consistently delivered

- Create and maintain accurate client records on back-office systems, platforms and other systems
- Liaise with product providers to ensure timely, complete and accurate responses
- Identify things that could go wrong, before they go wrong. Ask the right questions to ensure providers have given complete and accurate information. Always be one step ahead of the game
- Keep in touch with clients so they're aware of progress being made

Important attributes and experience

- Positive attitude, with a warm and friendly outlook
- Strong attention to detail
- Experience of Financial Services back-office systems and knowledge of Financial Services products, including pensions
- Able to work to defined business processes, but equally happy to share ideas for how they can be improved
- Strong ability to work in a self-managed capacity, to achieve agreed outcomes without supervision by prioritising and planning workload
- A great team player, adaptable and receptive to feedback
- Highly organised, methodical and disciplined, with initiative to take on new challenges and add value to the team
- Confident with technology, advanced Microsoft Office experience and electronic diary management
- Happy to take a flexible approach to work as needed

Qualifications
Financial planning qualifications would be ideal but previous relevant experience is also important.

Benefits

Employer pension contribution of 5%

Generous holiday entitlement plus your birthday and bank holidays

Financial support for exams

This role would suit an individual with two years or more Financial Planning experience. Development opportunities will be offered to the successful candidate.

Please send your CV with a covering email to emily@lifemattersfp.com