MONEY PENNY
WEALTH MANAGEMENT

We are looking for a Financial Services Administrator to join our Client Service Team based in Newcastle.

The Role

You'll be responsible for the processing and submission of financial planning business working closely with more experienced administrators and Financial Planners to ensure cases are submitted accurately, efficiently, and in line with provider and regulatory requirements. This role is primarily office based.

Responsibilities, once training is completed.

- Meeting and greeting clients,
- Answering incoming telephone calls and communicating with clients and providers in a professional manner
- Diary management and booking appointments with clients.
- Issuing new client packs.
- Liaising with platforms, product providers and clients.
- Chasing outstanding requirements and resolving queries
- Using back-office systems to maintain accurate records and workflows
- Carrying out Anti Money Laundering checks on new clients.
- Submitting new business across a range of platforms and providers
- Managing applications from submission through to completion
- Supporting Financial Planners and other Administrators with technical and administrative business processing tasks
- Preparing and issuing valuations for clients
- Preparation of the client files prior to meetings.
- Obtaining illustrations for new business and valuations for existing holdings
- Gathering information on plans and policies from providers, checking the accuracy of the data provided and preparing the relevant schedules for Financial Planners.
- General administrative duties including post, filing, photocopying/scanning/printing.
- Maintaining stationery and office equipment.
- Other ad hoc administrative tasks as required

About you

Essential skills

- Experience in professional office environment
- Excellent attention to detail and strong organisational skills.
- Excellent communication skills, both verbal and written
- Confident and professional manner when speaking to clients face to face and by telephone.
- Good working knowledge of Microsoft Word and Outlook
- Right to work permanently in the UK

The following would be advantageous but are not essential as full training will be provided.

- Previous experience in a financial service-related role.
- Familiarity with pensions and investments
- Experience using Intelligent Office
- Good working knowledge of Microsoft Excel.

Package

- Competitive salary
- Pension Scheme with 6% Employer contribution after 1 years' service
- 25 days Annual Leave + bank holidays and Christmas Close (4 days)
- Private medical insurance, Group life insurance, Income protection insurance and Health cash plan
- Discretionary bonus