

Job Title: Financial Services Administrator

Salary: £20,000 to £25,000 per annum

Job type: Full Time, Permanent

Location: Boston Spa, West Yorkshire

This is an excellent opportunity to join an ambitious, forward thinking and friendly office on a competitive salary and with genuine career progression.

To support the growth and development of our firm we are seeking an experienced Financial Services Administrator to provide full administrative support to the financial planners, and liaise with product providers, clients, and other colleagues via the telephone as well as face to face. You will work across a full range of financial products.

Company Profile

We believe that life is for living, which is why we provide holistic financial planning advice to our clients, who want to ensure they can continue to live life to the full.

This thriving and family run company is based in the heart of Boston Spa near Leeds. We have established ourselves over a number of years, as the trusted adviser for private clients seeking expertise on managing their finances. Our business is proud to hold the "Chartered Financial Planners" Firm status and Accredited Financial Planning Firm™ status.

We aim to give our clients the very best service and our employees the very best support in their work.

Our business is built on a firm commitment to customer care and the culture of our business reflects this.

Key Purpose of the Role

To support the growth and development of the business by providing a proactive and comprehensive administrative support service to the Financial Planners to enable them to maximise their time with clients, and ensure all clients receive a first class service.

Extremely motivated, you will possess excellent communication skills as well as being proficient in the use of Microsoft Office. With the ability to multi task you will have excellent time management skills and will thrive on working in an exciting, yet fast –paced environment, as part of a small team.

You will be given full training on how to use our computerized back office system, deal with a variety of tasks including, processing and submission of business, policy tracking and preparing for client meetings.

Tasks will include:

- Ensure that the business processing side runs smoothly by liaising with clients, the adviser and financial institutions
- To record and maintain accurate data using the company's back office computer system (Intelligent Office)
- Ensure that tasks and responsibilities are carried out to a high standard of accuracy with set timescales
- Preparing Client review meeting packs

Job Standards for the Role

- You must have previous administrative experience in the financial services sector working in an IFA support role for a minimum for 18 months
- Experience of bespoke letter writing and a good standard of written English. Excellent communication skills
- Excellent computer skills – practical IT application of Excel, Word, and Outlook. Positive “can do” attitude

How to Apply

If you have the experience and the desire to make a difference in this expanding company, please register your interest in confidence.

The successful applicant will receive a competitive basic salary, as well as a range of benefits. You will also enjoy being part of a small friendly team, where there is the opportunity to be an integral part in the growth of the business.

Please send your CV and a short covering letter to selson@beaufortplanning.co.uk explaining why the opportunity interests you and why you would be a valuable addition to our team.

We look forward to hearing from you.