# Job Description:

## Financial Planning Administrator

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|---|---|
| **Reporting to:** | Head of Team |
| **Location:** | Bishop's Stortford |
| **Special Requirements:** | None |

**Main Purpose of the Role**

To provide administration support to a team of financial advisers and a regular point of contact for clients of Tees.

# Main Responsibilities

**Generic**

- Input and maintenance of client information.
- Maintenance and integrity of client records.
- Administration of new and existing business.
- Preparation of client investment and pension reviews.
- Ensure both short and long term tasks are completed within required timescales.
- Provide assistance to colleagues in the Investment Department and the Wealth Department where practical, whenever there is spare capacity or it is evident that a colleague needs assistance with their workload.
- Client liaison and communication.
- Preparation of all paperwork, illustrations etc. for client meetings.
- General office duties plus any other duties reasonably requested by management.
- To be competent in all office IT and software systems and provider websites.

**Professional Qualifications**

- FPC 1 and 2 desirable.

**Required Competencies and Expected Level**

- Achieving Excellence (1)
- Communicating (1)
- Collaborating for Success (1)
- Understanding Issues (1)
- Finding Solutions (1)

## Person Specification

You have a responsibility to ensure your skill set remains up to date and you are familiar with the firm's departments, key personnel, clients, internal systems and procedures. This will ensure that you are able to carry out your role effectively and, where appropriate, discuss any training requirements with your manager.

| Behavioural and Technical | Essential/ Desirable | Definition |
|---|---|---|
| **Communication** | Essential | • Confident, clear and articulate communication skills both orally and in writing.<br>• Well presented, appropriate to a professional business environment.<br>• Pleasant telephone manner, speaks clearly and fluently. |
| **Planning and Organising** | Essential | • Ability to work in a planned and organised way, but has the ability to multitask and manage a variety of requests at any given time.<br>• Manages time effectively.<br>• Methodical, accurate and consistent even when under workload and/or time pressures. |
| **Working with others** | Essential | • Adapts and fits in well, able to work independently and within a team.<br>• Finds things to do to help others when capacity allows.<br>• Ability to build effective relationships with supervisors, managers, staff and clients.<br>• Act in an open and approachable manner.<br>• An awareness for the need for confidentiality. |
| **Technology** | Essential | • Computer, web literate and competent ICT skills.<br>• Experience using Microsoft office. |
| **Customer service and community focus** | Essential | • Professional, polite, enthusiastic and welcoming approach, able to maintain a highly professional approach at all times. |
| **Innovation** | Essential | • Has a proactive approach and will take responsibility for tasks and issues.<br>• Capable of taking initiative and finding solutions to problems.<br>• Awareness of level of responsibility and when and how to escalate issues appropriately. |
| **Equality and Diversity** | Essential | • Is aware of client needs. Respects others cultural viewpoints and perspectives, is constructive and understanding. Demonstrates empathy and is respectful. |