



# APPOINTED LTD

FINANCIAL RECRUITMENT SPECIALIST

## ***My Client***

Chartered financial planners dealing with high net worth clients with a fantastic reputation for the honest and professional advice they provide to the South. A highly professional team, with many home grown advisers, with years of technical experience between them.

## ***The Role***

You will be providing whole of market administrative support to the team of planners, paraplanners and clients.

- Dealing with client or provider queries promptly, via telephone and email
- Distribution of letters of authority and collating policy information from providers
- Fund performance analysis via FE Analytics and comparisons via Assureweb
- Maintaining client platform accounts, sale and subscribe, rebalancing and withdrawals and cash balances of Standard Life/Old Mutual Wealth
- Supporting the review process including assisting in the preparation of documentation ahead of client appointments
- Processing death certificates and changes to client personal information
- Recommending improvements to administration processes to increase efficiency

## ***The Candidate***

Candidates must have worked in a IFA Practice and have upto date product knowledge and be familiar with Intelligent Office and abrdn Wrap Platform. You will be a confident and clear communicator, both written and verbally alongside excellent attention to detail.

## ***The Package***

*This position is a mix between office and home based working within a flexi core hours work policy, paying upto £26,000 and a benefits package of generous holiday, flexi hours, bonus and pension.*

***Please submit a application for further information or contact Chez Dunning directly .***