



APPOINTED LTD

FINANCIAL RECRUITMENT SPECIALIST

My Client

My client is a small scale close knit IFA firm, with 2 very successful financial advisers part of a much larger AR...Due to internal progression they are seeking a experienced IFA Administrator to support the advisers and paraplanners with administration on Pensions & Investments working on Intelligent Office.

The Role

An office based role with flexibility on hours, full or part time (3 days).

- New business processing and meeting preparation
- Prepare packs for client reviews
- Liaising with clients, providers and third parties to obtain relevant information
- Build strong and professional relationships with clients
- Ensure all client data is kept accurate on Intelligent Office
- Provide technical assistance to the paraplanner
- Updating fact finds, preparing valuations and obtaining quotations

The Candidate

This role would suit a individual with a IFA practice background, who has been support financial planners, ideally working on Intelligent Office, and has a sound understanding of pensions and investments. You will be hardworking with a easy going, team player attitude.

The Package

You will receive a salary of circa £28,000 + 28 days holiday + BH alongside many other benefits & progression within paraplanning and advice with level 4 diploma support for the right individual.

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