United Kingdom Jobs Expertini®

Client Administrator

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Company: Nelson Scott

Location: United Kingdom

Category: other-general

Job Description

Client Administrator

Salary:to £ 35000 p.a.

Location:Southern England, Southern England

Type: PERM

Ref: VR/04897

Job Specification

For: Client Support Administrator

Who we are

·We are a financial planning and wealth management business.

·We illuminate our clients financial world. Building clarity and confidence in their mind and optimising every experience they have with us.

·We listen carefully and understand whats most important to our clients and where money fits into their world. We then create a financial plan designed to turn their dreams and aspirations into reality. Everything we do is designed to give our clients clarity, confidence and control.

·At the heart of our business is our people - a wonderful collection of different people who come to work every day to make a difference to our clients lives. We work together, supporting each other, living and breathing our values in everything we do.

·We are a really friendly, close-knit bunch of people and we believe our business is like no other - we take pride in everything we do, we celebrate success and have fun along the way.

Role Summary

Ultimately, a Client Support Administrator is responsible for the efficient and accurate processing of business and delivering a first class service to our clients.

Youll also need to understand and add value when it comes to our clients needs - looking at constant improvement and innovation.

nOnboarding - providing full administrative support for the onboarding of new clients;

nData management - maintaining and updating client data in a secure environment;

nReviews - preparation of client reviews, updating cash flow models, investment performance reviews and production of supporting reports, discussion documents and computer models;

nRelationship Building - liaison with clients by telephone, letter, email;

nProposition delivery - Delivering service proposition within agreed service levels and timescales

nCoordination - working with administrative staff to ensure application and provider forms are prepared as required and clients are updated throughout the process;

nPartners - working with other professional advisers e.g. solicitors and accountants to implement an agreed action plan.

What were asking for

We want original, collaborative and passionate people, open to new ideas, eager to learn and who love a challenge. Core skills that will be required include;

nBusiness thinking - understanding our business strategy and goals

nBuilding relationships - working together to create a collegiate culture

nCommunicating - Understanding, creating and sharing information with individuals and groups

nDecision making - using initiative and reasoning to choose a course of action

nDeveloping yourself and others - commitment to ongoing self-development

nInnovating and change - thinking creatively, generating new business ideas and approaches

You will also need to

·A Client Support Administrator is expected to have a minimum of 2 years of experience working with high net worth UK resident private clients and delivering financial planning and investment management services.

·A Client Support Administrator must be able to demonstrate an understanding of financial planning and basic product knowledge.

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Cross References and Citations:

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