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Client Support Administrator

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Company: Nelson Scott

Location: United Kingdom

Category: office-and-administrative-support

Job Description

Client Support Administrator

Salary:to £ 33000 p.a.

Location:South East England, South East England

Type: PERM

Ref: VR/05030

Job Specification

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Client Support Administrator

Role Description

The role of the Administrator is to work alongside our Team Leader(s) and Paraplanner(s) to ensure the appropriate end to end management of the client lifecycle using the agreed policies, processes and Intelligent Office.

The Administrator reports to the Team Leader and Support Manager.

Core Experience / Competencies

Previous Experience of Intelligent Office (IO)

Strong customer service ethos - able to build relationships of trust across a diverse client base.

Process driven - able to follow defined processes to evidence adherence to standards and policies, regulatory requirements and any other compliance demands.

Attention to detail - working with the Team Leader(s) and Paraplanner(s) to ensure that clients have all the information they need in order to review and make decisions about their investments; that providers have the correct details to carry out client instructions; and that all information is recorded in IO.

Problem solving - able to find solutions to issues and non-standard situations as they arise, ensuring appropriate escalation and recording in line with complaints processes and/or feedback to ensure continuous improvement on processes.

Collaborative Communicator - building relationships across the various teams and able to work with colleagues at all levels of the organisation.

Able to prioritise and manage workload - work with Team Leader(s) and Paraplanner(s) to understand and prioritise client-based workload while balancing day to day administrative tasks such as the maintenance of client data, documentation etc.

Responsibilities

Participates in weekly meeting with Team Leader(s) where workloads are prioritised.

Acts as key point of contact for clients; organising and dealing with correspondence via telephone, email or letter.

Responsible for the timely creation and ongoing update of accurate client records, both personal/fact find details and investment details within Intelligent Office. Ensures house-keeping activities on client data are allocated and prioritised including support from the Team Leader(s) and Paraplanner(s) when required.

Ensures that all client interactions are recorded using standalone tasks and purpose-built workflows within IO (e.g. new client, client review, new instruction, client on & off-boarding), providing an audit trail of activities and the ability to delegate workload to other administrators with relevant background details when required.

Works with the Team Leader(s) and Paraplanner(s) to ensure that basic client reports (suitability reports, annual review reports, meeting notes, portfolio report) are generated from IO/Genovo using the standard agreed templates; validating that investments populate from the tool with the correct values and details and that mandatory sections of the document are completed as specified.

Supports the Team Leader(s) and Paraplanner(s) in utilising other agreed toolsets to provide data for client identification, risk profiling, lifestyle planning, investment analysis etc.

Acts as main point of contact between providers and Team Leader(s) in the transfer, set up and administration of investments and policies on behalf of clients. This includes dealing with letters of authority, processing new applications, following up with ongoing transactions, resolving issues etc. ensuring that the client is kept informed on progress and is notified when transactions are completed.

Ensures that client fees and commission (initial, ongoing and ad-hoc) are set up and maintained correctly in IO to support accurate monthly payments to Pembroke and provide an accurate view for client reporting.

Ensuring that all client communications and documentation are scanned and filed in IO in a timely manner to ensure compliance with file checking processes.

Supports the Team Leader(s) and Paraplanner(s) in maintaining up to date client records to ensure compliance with Anti-Money Laundering / Know Your Client, GDPR and other statutory/regulatory rules. Ensures details and supporting documents are recorded in IO.

Provides support for Support Manager in defining and carrying out organisational projects/initiatives.

General office duties including answering phones, photocopying, filing and scanning.

Acts as cover for Receptionist or other support team members when out of office (breaks, annual leave, sick leave etc.)

Other Obligations

Complete mandatory/regulatory training to given deadlines.

Adhere to policies.

Maintain a clear desk and ensure all client documentation is locked away securely out of hours.

Ensure that all confidential paperwork is either scanned to the relevant file and disposed of in the confidential data bins or shredded.

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