

## IFA Administrator/Assistant

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Company: Nelson Scott

Location: United Kingdom

Category: other-general

### Job Description

#### IFA Administrator/Assistant

Salary: to £ 26000 p.a.

Location: South East England, South East England

Type: PERM

Ref: VR/04324

Administrator/ Assistant

- § Answer and transfer telephone calls or take messages
- § Schedule appointments and receive customers or visitors
- § Account Opening Administration
- § Maintain office filing
- § Information gathering and management
- § General Photocopying and scanning
- § Sort and deliver incoming mail and send outgoing mail
- § Create and maintain client records and databases
- § Deal with Client Queries
- § Liaise with our back office for account maintenance, payments & updates
- § Typing - reports and correspondence
- § Stationery / Supplies Ordering
- § Processing new business applications.
- § Speaking with providers to obtain information relating to clients policies.

§Sending letters of authority to providers.

Key Skills

§Financial Services Background

§Microsoft Office

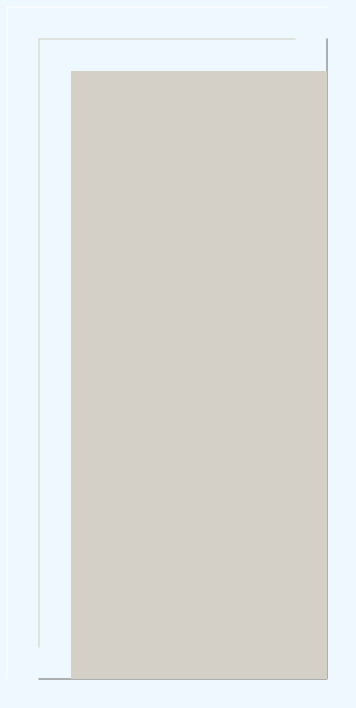
§Organisation and planning

§Work and time management

§Verbal and written communication skills

§Attention to Detail

§Knowledge of administrative & clerical procedures



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