

Investment Administrator (2548)

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Company: Cathedrala appointments

Location: Exeter

Category: business-and-financial-operations

£28-£35k DOE | On-Site | Exeter

Our client an award-winning Finance and Wealth Management company is seeking an **Investment Administrator** to join their experienced and friendly Investment Services department based in Exeter. As the Investments Administrator, you will provide administrative support to Investment colleagues. Ensuring the team remains compliant and provides excellent client service.

This role is 100% based on-site in the Exeter Office.

Responsibilities of the Investment Administrator:

Assist in the administration of client accounts and onboard new clients, through the collating of data and documents, and ensuring the data is input accurately

Processing the movement of funds between accounts, as well as client payments and ISA Subscriptions

Assisting with general client phone and email enquiries and ad-hoc requests

Reporting any risk which may be detrimental to clients or to the firm's reputation, which arises from inadequate procedures, systems or data handling

Ensuring compliance with FCA requirements, the Branch Manual, Code of Conduct policies and framework

Skills/Qualifications for the Investment Administrator:

Educated to A-level standard, including 5/GCSEs in Maths and English

Previous working knowledge of Financial Services and the FCA

Experience working in an administrative role and analysing complex information

Proven experience and confidence using Microsoft Office Applications (Intermediate level)

The benefits for the Investment Administrator:

Pension (Standard Life) – Employer contribution = 5% of qualifying earnings

Private Medical Insurance

25 days Annual Leave + Bank Holidays (with extra holidays available for length of service increasing to 29 days)

Employee Assistance Programme

Travel Loans

Cycle to Work Scheme

Commission-free Dealing

Group Life Assurance (4 x basic salary)

... Plus perks

Note on SponsorshipWe regret to inform you that at this time, we are unable to offer sponsorship for work authorisation for this role. Therefore, candidates must possess valid authorisation to work in the UK without requiring visa sponsorship.

Recruitment Consultant: Joanne Howell

Ref: 10387

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