

URGENT x3 Client Administrator (Financial Services)

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Company: Montpellier Resourcing

Location: United Kingdom

Category: other-general

Client Administrator (Financial Services)

Up to £25,500 plus bonus and benefits

12 month FTC

Hybrid working available!

Due to rapid growth, an exciting opportunity has arisen to join a boutique Investment House based in Bristol, as they seek to hire a Client Administrator to join their team. You will be responsible for ensuring that the Team's operations run smoothly and efficiently, enabling them to deliver excellent customer service.

Duties of the Client Administrator to include:

Deliver superior client service by initiating the account opening/account amendments process, which involves reviewing documentation, ensuring completeness, and monitoring progress until completion.

Monitor and track the advancement of client cases, collaborating with Investment Managers or directly with Professional intermediaries as necessary.

Ensure prompt banking of client cheques and accurate allocation of funds in a timely manner.

Maintain money laundering documentation to support robust risk management practices.

Promote adherence to best practices by advising Investment Managers on proper documentation and procedures.

Assist in generating income by providing administrative support to increase the capacity of Investment Managers handling multiple IFAs.

Requirements for the successful Client Administrator candidate:

Previous experience in an administrative or team support role essential. Financial services / financial planning experience would be highly beneficial.

Personable and professional with strong time management skills and a keen eye for detail

Strong IT skills including Microsoft Office packages.

This vacancy is being advertised by Montpellier Resourcing Associates Limited. The services advertised by Montpellier Resourcing Associates Limited are those of an Employment Agency.

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