



BARRY FLEMING & PARTNERS

Vacancy - Financial Planning Administrator

We are a well established Family owned wealth management firm who provide a wide range of independent financial planning services to high net worth clients. We are seeking to add another experienced Administrator to our small team.

We are passionate about our Business, combining traditional values with a modern approach and take great pride in delivering an outstanding service to our clients.

Role Profile

Our current requirement is for a Financial Planning Administrator with at least 3-4 years experience to join the business to provide admin support to the Financial Planning team. Candidates should be experienced within an independent Wealth Management IFA Company.

Your work will be varied, from managing all aspects of the client journey including client liaison and correspondence. This role also offers a great opportunity for career progression.

The role is offered on a full time basis and is based at our Barn style office in Newbury with free onsite parking. Whilst the role is office based, we currently split our time between working from home and the office depending on the needs of the business.

Package

Basic salary from £22k - £32k depending on experience

Benefits: 25 days holiday; Pension, Death In service

Full time - 8.45am to 5.15pm

Based in Newbury, Berkshire

Key Responsibilities

- Managing and maintaining the ongoing correspondence and liaison with clients
- Maintaining client records, databases, documents and files in line with the Compliance requirements and Company standards
- Organisation and preparation of documentation for Annual Reviews and Meetings
- Completing applications (both paper & Electronic) and submitting forms on behalf of clients
- Using IT programmes including Finametrika, Smart search, FE Analytics, MS Office & provider platforms (Including Aegon)
- Building and maintaining strong relationships with our clients

Core Skills Required

- To have at least 3-4 years experience of working within an independent IFA Company with Pensions & Investments
- The ability to prioritise work and to work within deadlines
- A proactive 'can do' attitude is a must
- Adaptable and flexible
- Excellent organisational and time management skills
- Highly motivated individual with good attention to detail, completer/finisher mindset
- Excellent communication and interpersonal skills
- To demonstrate the ability to multi-task and cope with changes in the priorities and the daily workload