

JOB DESCRIPTION

Job title:	IFA Administrator
Location:	Weymouth
Reports to:	Director

Main job purpose

The post holder will provide comprehensive administrative support to Financial Advisers and other colleagues.

Main responsibilities and duties

1. Carry out all administration duties to fully support Financial Planners
2. Obtain valuations, information and product details for analysis
3. Liaise with product providers and other third parties
4. Process new business, withdrawals, fund switches and follow through to completion, working closely with the Paraplanner
5. Deal effectively with queries from clients and other parties
6. Book in annual review meetings with clients and manage diaries
7. Make up and maintain compliant files
8. Comply with the principles of Treating Customers Fairly in all aspects of the role of IFA Administrator
9. Answer the telephone and take information and actioned as appropriate.
Telephone answering will be on a ad hoc basis with the other administrator
10. Any other lesser or comparable duties as required

Supervision & management

1. The post holder will be required to work under the direct supervision of the line manager
2. The post holder will not be required to supervise other staff

Resources

1. The post holder will have shared responsibility for small items of equipment
2. The post holder may have some responsibility to handle small amounts of cash

Working Environment

1. Work is subject to interruptions to deal with queries from clients via telephone or face to face
2. Majority of work will be computer/keyboard based, but with regular opportunities for breaks away from the computer to undertake other work
3. Lone working may be required by the post holder, with key holder responsibilities.

Date prepared: March 2024