

PERSON SPECIFICATION

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

Education, Qualifications & Training/Experience

- A minimum of 1 years' experience within the financial services industry – ideally specific experience in providing administration support for an IFA
- Industry qualifications are desired, but not essential
- Demonstrable experience delivering the highest level of service to clients
- Understanding the needs of the businesses Financial Advisers as well as FCA rules and requirements

Key Skills

- Understanding of the Financial Planning process
- Able to work within defined business processes
- Ability to achieve agreed outcomes without supervision
- Prioritise and plan own workload
- Detailed and accurate
- Articulate
- Excellent interpersonal skills, both written and verbal
- Ability to multitask and prioritise effectively
- Good IT skills
- Ability to work independently and in a team

IT Skills

- Fully competent in desktop applications (proficient in Microsoft Word, Excel and Outlook)
- True Potential is our back-office system – experience preferred but not essential

Personal Skills

- Communication: Ability to communicate effectively both verbally and in writing, and to deal with individuals at all levels
- Team working: Ability to contribute as part of a team, and deal with individuals at all levels within the business
- Professional integrity: The strength of character to explain a professional point while having empathy with a customer
- Relations with others: The personal qualities and skills that promote open and constructive relations with colleagues and customers
- Flexibility: The flexibility for and commitment to continual service development and improvement
- Be able to work within defined business processes

Evidence method of criteria

1. Application form
2. Sight of certificates
3. Interview
4. References

Other factors

- To be flexible with an adaptable approach to work
- To undertake training as required

Date prepared: March 2024

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