



IFA Administrator (Annual Review)

Formed in 2014 by our founder Nicola Whateley, Whateley Wealth Management is a leading provider of mass market financial services in the West Midlands, advising on Pensions, Investments, Mortgages, and Insurance.

We firmly believe that everyone deserves a secure financial future and have structured our business to deliver this. Our mission is to make the complex simple, giving our clients peace of mind.

We are a dynamic and forward-thinking business and have grown rapidly since our launch. We are active in the local community and still hold dear to our family values; regarding staff and clients as family and treating everyone with integrity and respect.

We now have an exciting opportunity for an IFA Administrator to join our team and help us continue to deliver on our mission and make a difference to our clients.

We are an equal opportunities employer believing passionately in the benefits of diversity in our workforce. We are committed to treat all candidates fairly, regardless of Ethnicity, Age, Gender, Sexuality, or Disability.

This is an outstanding opportunity to train within a varied position covering many different aspects of administration and technical duties within the company, supporting advisers to deliver the best service to our clients.

Tasks and Responsibilities:

- Booking the Annual Reviews for each adviser each month, by telephone, email or post and continuing to contact clients, at intervals, if unable to reach them first time.
- Preparing the Annual Review packs, to include valuations, fund factsheets, provider literature and any required compliance documents.
- Managing the Annual Review process in its entirety, ensuring data is updated in full to ensure correct MI reporting.
- Dealing with day-to-day client and provider enquiries
- Obtaining relevant information from providers
- Making outbound telephone calls and receiving inbound telephone calls
- Preparing for client meetings including quote requests, obtaining valuations and appropriate literature
- Preparing and submitting applications and supporting documents to product providers
- Inputting new business proposals to the back-office system in line with Company procedures
- Undertaking fund switches upon the instruction of the client
- Report writing



The ideal candidate for the role is an individual who is:

- Self-motivated
- Highly organised
- Client focused
- Professional
- Pro-active and has a positive nature, combined with excellent all round communication skills, and a good telephone manner.
- Skilled in rapport building, and have well developed skills in computer software, especially Microsoft Office.
- Focused and have thoroughness in accomplishing a task, displaying high levels of accuracy and attention to detail.
- Able to multitask and achieve agreed outcomes without supervision and work to demanding deadlines.
- Eager to enjoy work within a high achieving and committed team.
- Discrete and highly protective of our client's confidential personal data.
- Minimum 12 months administration experience

Job Types: Full-time, Permanent, Apprenticeship

Salary: £23,000-£25,000 per annum (dependent on experience and qualifications) plus bonus scheme

Benefits:

- Company pension
- Private medical insurance (following probation period)
- Cash plan (following probation period)
- Exam support

Schedule:

- 8-hour shift (37.5 hours per week)
- Monday to Friday
- No weekends

Work Location: Office based in Cofton Hackett (B45)

To apply for this role, please send your CV to our Office Manager, Kelly Shephard, at kelly@whateleywm.co.uk .