



IFA Administrator (New Business)

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:

- Working with an adviser to follow the full new business process until completion
- 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
- Chasing providers until case completion, and resolving any issues that may arise
- Inputting new business proposals to the back-office system in line with Company procedures, ensuring data is updated in full to ensure correct MI reporting
- Ensuring all cases are compliant, in line with Company procedures and industry regulations
- Undertaking fund switches and withdrawals 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.
- Good knowledge of pensions and investments (desired)
- Minimum 2 years administration experience within an IFA environment (essential)
- CII Financial Services Exam pass (desired)

Job Types: Full-time, Permanent, Apprenticeship

Salary: £25,000-£30,000 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.