

Job Description

The Opportunity

We are looking for someone to provide high quality Financial Services administration. You will be providing administrative support to one or more financial advisers, which includes but is not limited to, the following:

- Dealing with day to day client and provider enquiries
- Arranging client meetings for the adviser
- 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

What's needed to be considered?

In order to be considered for this unique opportunity, candidates need to have -

- 2 years minimum experience in a Financial Services administration role where you have worked with Independent Financial Advisers (essential)
- Strong understanding of Pensions & Investments
- Proficient using Microsoft Office (essential)
- Proficient using database systems (desirable)
- Professional communication manner, both written and verbally
- Entry level CII Financial Services Qualifications (required)

Full Time 37.5 hour per week Monday – Friday 9:00am – 5:00pm

Salary dependant on experience and qualifications. Company Benefits package included.

To apply please contact the Office Manager Laura Tricklebank

Job Type: Full-time

Salary: £18,000.00 to £25,000.00 /year

Whateley Wealth Management Limited

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