We Are Hiring!

Client Services Administrator: Full Time Vacancy

An opportunity has arisen for a Client Services Administrator to join a successful and growing company.

Wise Investment is an independent, employee-owned wealth management and financial planning business. Since the company was founded in 1992, we have provided financial planning and investment management solutions to private clients. Quality and excellence sit at the core of our values and our team of experienced, qualified investment and financial planning professionals are committed to providing the best service with attractive returns, through the development of long-term relationships with our clients.

The main areas in which we specialise are long term investment management, planning for retirement, generating income from assets, and financial protection. We also advice our clients on how to pass money through the generations in an appropriate and tax-efficient way.

We aim to give the type of advice that we would want to receive ourselves. Ultimately, our aim is to take the financial complexities and worries away from our clients allowing them to spend time focusing on the things in their lives that matter most to them, whether it is work, business, family or simply enjoying a well-earned retirement.

Please continue...

Client Services Administrator

Main Responsibilities

The successful candidate will be working as part of Wise Investment, based in Chipping Norton.

The office hours are Monday- Friday 9am to 5pm.

The primary purpose of the Client Services Administrator role is to support our team of advisers and other administrators with all aspects of administration for investment, pensions and other financial arrangements, providing excellent customer service.

The successful candidate will report to the Head of Administration and will work within an established team of experienced administrators.

The following is a selection of the duties to be carried out:

- Sourcing and preparing documentation, completing application forms, trading unit trusts, investment trusts and shares.
- Submitting new business and following through to completion, checking, recording and reconciling transactions.
- Liaising with advisers, clients and investment/insurance companies and general problem solving.
- Dealing with ongoing queries and administration.
- Preparing valuations and client review packs.
- Writing letters and correspondence, scanning, filing and answering the phone.
- Other general duties as and when required.
- All work must comply with inhouse and FCA regulations and be carried out on a professional level to a high standard.
- This role involves extensive use of Office 365 and bespoke database software.
- The role holder may also be required to undertake reasonable additional or other duties as are necessary to meet the needs of the business.

Please continue...

Client Services Administrator

Key Requirements

- Previous experience of working as a client services administrator, within financial services, is desired
- Strong administration skills are essential
- Excellent knowledge of Office 365
- Clear and polite telephone manner
- Being able to work alone as well as part of a close knit team
- Being able to work under pressure whilst sticking to strict deadlines
- Excellent written & verbal communication skills.
- Accuracy and attention to detail
- Highly organised and adaptable.
- A robust work ethic and a strong sense of responsibility.

Salary and Benefits

Basic salary	dependent on experience
Pension contribution	5% of basic salary. Salary sacrifice available
Holiday allowance	29 days, plus Bank Holiday & Christmas week One volunteer day per year
Individual training budget	£1,000 per year (10% can be used for personal training)
Death in service	4x basic salary (salary cap £245,000)
Income protection	Maximum 75% of basic salary (salary cap £145,000)
Working hours	Working hours 35 hours per week
Probation period	6 months

Offers of employment are reliant on the receipt of satisfactory references and background checks such as adverse credit and DBS (basic).

Please apply by sending you CV and covering letter to michelle.badejo@wiseinvestment.co.uk