Client Service Administrator

Citywide Financial Partners, Leatherhead, Surrey

We are looking for an outstanding administrator who has the diligence and skills to become a valuable member of a client focused financial planning firm. Through your commitment and talent you will make a significant contribution to the growth and ongoing success of our small but aspirational company from the outset.

<u>The Company</u>

Citywide Financial Partners, is about a fresh innovative approach to personal financial planning.

The Financial Success Programme, our unique financial planning process, starts by identifying an individual's life-goals, long-term ambitions and ideals. We combine advice and on-going support to help our clients achieve these goals through state of the art investment portfolio construction; cashflow planning and modelling; pension and retirement planning; inheritance tax and estate planning and capital protection.

Through the use of our industry leading online client portal, MyCitywide we are able to work closely with our clients to ensure that the decisions made are both well informed and timely.

<u>The Role</u>

You will be working with the Client Service team: Administering new client pensions, investment and risk contracts alongside servicing existing client arrangements. In addition to this you will conduct effective liaisons with product providers and strategic partners, as well as updating client and product records.

Part of your role, will be to take on ad hoc project work and various administrative duties in the office offering you exposure to the full range of our business activities from day 1. As your understanding of the industry and our corporate strategy develops, you will have the opportunity to take industry exams and develop your knowledge further through training and learning.

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Skills

- Excellent communication skills, in writing, on the phone and face to face. You will need to have the confidence to communicate effectively with people of all levels.
- Confidence with numbers, strength in producing precise and accurate documentation and record-keeping.
- The ability to prioritise and organise your workload to meet deadlines.
- A professional manner, positive attitude, self-motivation and proactive approach.
- The ability to work well within in a team as well as independently.
- Experience with Advisor Office or a similar Financial Services back office system.
- A high level of proficiency with Microsoft Office products.
- The ability to familiarise yourself with new technology quickly and efficiently.

Requirements

- Minimum of 18 months experience in the Financial Planning industry
- GCSE English and Maths A*- B (or equivalent)
- Fluent English
- The unrestricted right to work in the UK

Contact Audrey Wade with a CV and covering letter to apply:
audrey.wade@citywidefinancial.co.uk