Pareto | ALL MATTERS FINANCIAL

JOB DESCRIPTION – EMPLOYEE BENEFITS ADMINISTRATOR			
Job Title:	Employee Benefits Administrator		
Reports to:	Employee Benefits Team Leader		
Department:	Operations		
Location:	Manchester City Centre	**Date of Job Description**	January 2021
Purpose of the role:	To provide first-class administration support to the Employee Benefit department working together with a team of Financial Advisers and Paraplanners, in order that we may provide the corporate client with a positive professional experience, offering highly technical and qualified knowledge and ongoing assistance.		
Key Duties	**GENERAL ADMINISTRATION** • Answer telephone within three rings and in a professional manner. • Deal with all incoming call enquiries and redirect where required. • Deal with incoming/outgoing post • Maintenance of the back-office system at all times through all processes. **EMPLOYEE BENEFITS** • To process new business for Auto Enrolment, GPP's and Risk Schemes. • Requesting new business quotes and liaise with advisers • Ensure that all new business is input in to the back-office system Intelliflo accurately, including commission expectation • Deal with any leavers/joiners to schemes • Deal with any claims on risk and pension schemes • Send LOA's to Insurance Providers and ensure that all documentation is received back • Request member data for scheme renewals • Collate member data and request quotes (if applicable) or renewals • Collate quote results and pass these to the Advisers to sign off ready to compile recommendations (renewals) • Checking and issuing policy documents and accounts • Complete all general correspondence as required ensuring that the financial adviser and clients are provided with an effective and efficient service • Keep files up to date ensuring that all compliance documents are present and correct • Provide any general information as requested by the clients, consultants and the management team • Request pension scheme governance information from providers and ensure information is received back • Drafting of reports (Governance and group risk reports) for scheme Advisers • Issuing client invoices **FINANCIAL ADVISER TARGETS** • Actively participate in the team achieving quarterly bonus based on Sales Targets. **COMPLIANCE** • Adhere to FCA regulations in accordance with our compliance procedures. • With Compliance Department assistance, keep up to date with legislation/compliance matters. • TCF - Treating Customers Fairly – pay due regard to the interests of our clients and treat them fairly in line with our TCF Mission Statement.		

Key Duties Continued	**RELATIONSHIPS** • Develop and maintain good working relationships with Financial Advisers, colleagues and management in order to provide an efficient and effective service to the Financial Adviser and the Client. • Maintain an effective ongoing relationship with Professional Introducers where applicable. • Establish good ongoing working relationships with Providers.
General Duties	• Adhere to Company H&S policy. • Adhere to Company Procedure and Policies at all times. • Represent the company in a professional manner at all times. • Any other duties as and when required by the Company.
Skills & Experience	• Broad and current knowledge of financial services and financial planning preferred. Experience within an IFA practice ideal but not essential. • Excellent Communication Skills – both written and oral. • Good attention to detail. • Ability to work on your own or within a team. • Excellent organisation skills. • Excellent Telephone Manner. • Good knowledge of Microsoft Office/IT skills. • Proactive and flexible in their approach to work and willing to go the extra mile.
Education / Qualifications	• GCSE (or equivalent) English and Maths • Industry exams are advantageous but not essential.
Reward Package	• Competitive Salary • 35 hours per week • 25 days holiday plus Bank Holidays. • Loyalty holidays with continued service. • Birthday holiday • Christmas Closure (need to retain 3 days from allowance) • Quarterly Bonus Scheme • Pension • Private Medical Insurance • Life Assurance • Fully funded company social events – summer and winter • Generous Study/Training Program • Personal Development Plan; Annual Appraisal System
The Company	• Pareto Financial Planning Limited was founded in 2008 and are an award-winning firm of independent financial advisers (IFAS), with an established reputation for dealing in all areas of financial planning. • Winner of The Talk of Manchester Business Awards – Best IFA • We value our people; now employing 55 people – recently boosted its turnover to over £4 million. This has led to new clients and total funds under influence being more than £750 million. • Company growth is 20% year on year. • Training Academy ethos for those that want to develop their career. Company provides an excellent In-House training program for you to progress your career including a generous study scheme and Personal Development Plan. • Great atmosphere, team spirit and thoroughly enjoyable working environment. • Organised social events calendar for all who want to participate. • Good work/life balance structure in place. • Dedicated to various charities throughout North West.
To Apply	Nicky Aspray – Operations Director careers@paretofp.com