Pareto | ALL MATTERS FINANCIAL

JOB DESCRIPTION – ADMINISTRATOR			
Job Title:	Administrator		
Reports to:	Pareto Team Leader		
Department:	Operations		
Location:	Manchester City Centre	**Date of Job Description**	August 2021
Purpose of the role:	To provide first-class administration support to a team of Financial Advisers and Paraplanners, in order that we may provide the 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. • Meet and greet clients in appropriate manner • Deal with incoming/outgoing post • Maintenance of the back-office system at all times through all processes. **Pre-New Business** • Compile Letters of Authority, sending to Insurance Providers and collating policy information when received for Paraplanners, Financial Advisers. **New Business** • Process New Business Applications in agreed timeframe. • Ensure all new business submitted to the insurance providers is fully completed and compliant. • Update New Business Register and back office system with new application information. • Monitor new business progress and chase outstanding documentation on behalf of the Financial Advisers. **Post-New Business** • Check accuracy of Policy Documentation. • Produce Portfolio Valuations and Summary Reports for Financial Adviser review meetings. • General client servicing, change of policy information. **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. **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 time. • 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. • Company provides an excellent In-House training program for you to progress your career including a generous study scheme and Personal Development Plan.
Reward Package	• Competitive Salary dependent on proven experience. • 35 hours per week • 25 days holiday plus Bank Holidays. • Loyalty holidays with continued service. • 1 x day 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; 1:1 meetings and 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 a team of more than 60. This has led to new clients and total funds under influence being more than £800 million. • 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