

| JOB DESCRIPTION – PARAPLANNING ADMINISTRATOR | | | |
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| Job Title: | Paraplanning Administrator | | |
| Reports to: | Technical Services Manager | | |
| Department: | Operations | | |
| Location: | Manchester City Centre | Date of Job Description | July 2022 |
| Purpose of the role: | <ul style="list-style-type: none"> To give administrative support to the Paraplanners and Financial Advisers To ensure that all information required by the Financial Advisers and Paraplanners is requested and received from product providers To provide the client with a positive and professional experience, offering ongoing assistance as appropriate | | |
| Key Duties | <p>OBTAINING PRODUCT INFORMATION</p> <ul style="list-style-type: none"> Upon receipt of a signed letter of authority, add plan details to client records on Intelliflo Office Send letter of authority to the relevant product providers and chase up responses within the relevant timescales Create appropriate task on Intelliflo Office and keep this updated with full audit trail of progress Check received information to ensure that all required information is included Query any outstanding information or anomalies, as appropriate Update Intelliflo Office with plan details Add provider documentation to Papercloud Elite document storage <p>PREPARING REPORT PACKS</p> <ul style="list-style-type: none"> Print and package suitability reports in preparation for client meetings Enclose and prepare all relevant provider documents and paperwork <p>TECHNICAL KNOWLEDGE</p> <ul style="list-style-type: none"> Build on any existing industry knowledge and improve awareness by attending any relevant training sessions and the in-house Compliance briefings. Keep up to date with existing products, new products entering the market and regulatory changes. <p>COMPLIANCE</p> <ul style="list-style-type: none"> Adhere to FCA regulations in accordance with our compliance procedures. TCF - Treating Customers Fairly – pay due regard to the interests of our clients and treat them fairly in line with our TCF Mission Statement. <p>RELATIONSHIPS</p> <ul style="list-style-type: none"> 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. Establish good ongoing working relationships with product providers. | | |

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| General Duties | <ul style="list-style-type: none"> • Adhere to the Company Health and Safety policy. • Adhere to all other Company Procedure and Policies at all times. • Represent the company in a professional manner at all times. • Perform any other reasonable duties as and when required by the Company. |
| Skills & Experience | <ul style="list-style-type: none"> • Excellent interpersonal skills, both oral and written. • Confident and self-assured with a positive approach to change, ability to remain calm and work well under pressure. • Detailed and accurate in every aspect of the role. • Broad and current knowledge of financial services and financial planning. • Good knowledge of Microsoft Office/IT skills. • Working knowledge of Intelliflo Office would be ideal but not essential. • Good planning and organisational skills, with the ability to organise and prioritise workloads. • Proactive and flexible in their approach to work and willing to go the extra mile. |
| Education / Qualifications: | <ul style="list-style-type: none"> • Financial Services qualifications, or desire to study towards them desired 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 | <ul style="list-style-type: none"> • Competitive Salary • 35 hours per week • 25 days holiday plus Bank Holidays. • 1 x holiday - Birthday holiday • Loyalty holidays with continued service. • Christmas Closure (need to retain 3 days from allowance) • Quarterly Bonus Scheme • Perkbox Scheme • Pension (auto-enrolment, then 5% + 5% contributions after 6 months) • Private Medical Insurance (after 12 months) • Life Assurance • Fully funded company social events – summer and winter • Generous Study/Training Program • Personal Development Plan; Quarterly 1:1 meetings and Annual Appraisal System |
| The Company | <ul style="list-style-type: none"> • 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 50. This has led to new clients and total funds under influence being more than £1 billion. • 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 | <p>Julie Chadwick – HR Manager careers@paretofp.co.uk</p> |