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**	February 2023
Purpose of the role:	To provide first-class administration support to the Employee Benefit department working together with a team of Financial Advisers, 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

- Deal with all incoming call enquiries in a professional manner and redirect where required.
- Deal with incoming/outgoing post and emails
- Maintenance of the back-office systems at all times through all processes

EMPLOYEE BENEFITS

- To process new business for Auto Enrolment, GPP's, Group Risk Schemes, Cashplans
- Requesting new business and renewal quotes and liaise with advisers.
- Ensure that all new business is input into 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 from clients
- 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, clients 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 Employee Benefits Products 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	We are powered by our people. They are what brings Pareto to life and what makes our company one of a kind beyond the services we offer. We are committed to progressing, empowering and celebrating our people and offer a generous reward package which includes: • Competitive Salary • 35 hours per week • 25 days holiday plus Bank Holidays, and an Additional Birthday Holiday • Christmas Closure • Pension • Private Medical Insurance • 4 x Death in Service • Long Term Service Benefit Enhancements • Competitive Bonus Scheme • Rewards Scheme • Fully Funded Summer and Winter Social Events • Generous Study/Training Program
The Company	Since being founded in 2008, Pareto Financial Planning has seen company growth of 20% year on year. We currently have over £1 billion in Assets Under Management on behalf of thousands of diverse clients and we manage employee benefit solutions for over 500 companies. We are a friendly team of over 70 experts all working with one common goal in mind; to deliver a positive outcome in everything we do. In addition to our competitive rewards package: – We are committed to **career development** - providing an excellent in-house training program to support this with a generous study scheme and Personal Development Plan – We operate a **hybrid working** model. – We **celebrate diversity** and are committed to creating a diverse and inclusive organisation. – We have an active Culture & Values Committee who work hard to create a **positive and healthy culture** within our organisation. – We are **committed to our community** - we support various charities throughout the Northwest and have an employee nominated Charity of the Year and a quarterly Community Funding Scheme – We **plant a tree for every employee** every six months via Manchester City of Trees We make conscious changes with **corporate responsibility and environmental sustainability** in mind, these are reported on in our annual Social Impact Report.