



Job Description – IFA Administrator

About Us, Our Clients and Our People

Berkshire IFA is an ambitious and growing company committed to our Clients, the outcomes they are seeking, and to our team of people who will help our clients achieve these outcomes. We support all of our team in their own journey both professionally and on a more personal level. We do this by supporting all training and development and offering package of benefits designed to look after our people's health and well-being. To this end although we are quite a young company some of our people have been around for a while, and some have over 20 years' experience in the Financial Planning industry!

We specialise in retirement, pensions and intergenerational family wealth planning for a diverse spread of Clients. Regardless of background our mission is to give all our client's financial security by offering high levels of service and giving our clients solutions to the financial and personal outcomes they are seeking. At the core of this is our aim to know our clients in a way that goes beyond just the financial advice. In practice, this objective means when they pick up the phone to us, we already have a broad view of what they may be about to ask!

The Role

Summary

- Quickly and effectively deal with queries from clients through clear and thorough communication.
- Ensure all written and electronic client communication are accurately recorded and maintained to Intelliflo (iO).
- Collect, collate, and record client policy information and critical data in accordance with the principles of KYC.
- Obtain policy information, quotes, illustrations, and product details.
- New client on-boarding from initial contact until funds are invested.
- Process and submit new business to providers and ensure applications are completed efficiently.
- Placing investment trades, fund switches, and on occasion, conducting peer reviews on fund switches instructed by colleagues.
- Organising financial planning annual reviews with clients on behalf of the Financial Adviser.

- Prepare documentation for initial client meetings and annual financial reviews, including product literature, illustrations, provider forms and client agreements.
- Be proficient sending critical client data by DocuSign and other electronic methods.
- Create, schedule, and manage follow up tasks relating to client meetings, ad-hoc requests, and new business submissions on iO.
- Comply with internal and FCA compliance policies and procedures, ensuring all client data and information remain confidential and compliant e.g., AML & GDPR.
- Commit to continuous personal development.

Team Support/Communication

- Assist and work collaboratively with other members of the Administration and Paraplanning team.
- An IFA Administrator is also expected to support with the training and development of the new administration staff.
- On a day-to-day basis you may be required to peer review colleague work, which could include new applications and technical fund switches on provider platforms.

Experience & Qualifications

- A minimum of 1 years' experience within the financial services industry.
- Experience using iO is desired, but not essential.
- Strong technical knowledge of investments, pensions, and family wealth planning.
- Excellent written and verbal communication skills are essential.
- A very high attention to detail and accuracy is also essential.
- Demonstratable experience delivering the highest level of service to clients.
- Excellent IT skills and proficiency on Microsoft Office packages, with an intermediate knowledge of Excel.
- Understanding the needs of the businesses Financial Advisers as well as FCA rules and requirements.
- Industry qualifications are desired, but not essential.

Key Competencies

- Working under pressure individually and as part of busy teams, to meet sometimes strict deadlines and urgent client needs.
- Demonstrate motivation and focus delivering an outstanding level of customer service to clients.
- Demonstrate comprehensive professional judgement, self-initiative, common-sense and innovate approach to problem solving.
- Be able to learn quickly and effectively, gaining knowledge of the company's services, products, sales policies, compliance, and administration procedures.

Location:

Winnersh Triangle, Reading. The role is currently 100% office based.
Our offices are open from 8am to 5:30pm to allow for flexible working hours.

Hours of Work:

Full Time – 37.5 hours per week.

or

Part time – 20, 25 or 30 hours per work are available.

It may be necessary to occasionally work outside of normal office hours to meet the demands of our Clients.

Salary:

Ranges from £22,000 to £32,000 dependant on experience full time (pro – rata for part time)

Benefits:

1. 25 days per calendar year (plus Bank Holidays).
2. Life Cover for everyone – You will get 4 x death in service.
3. Income Protection – For team members out of probation, you will get 66% of your salary, after 3 months with indexation by 5% per annum.
4. Health, Optical and Dental Cover – This will cover you, and with a variable extra amount it will cover your spouse and cover your children under 18.
5. Cash Plan – To assist with policy excess amounts and other incidentals i.e., some optical and other benefits.
6. Flexible Hours – Everyone works their contracted hours per week, but these can be flexible across three shifts;
 - Early shift which is between 8am and 4.30pm.
 - Standard shift which is between 9am and 5.30pm
 - Late Shift which is between 9.30am 6pm.
 - All shifts have up to 1 hour for lunch. If you chose to, you could take 30 minutes instead of 1 hour for lunch instead and finish a little earlier (with your line managers approval).
 - Part time Workers will work their hours within the shift patterns above. Either 20 hours, 25 hours or 30 hours per week are available.
7. Paid Sick Leave – Up to 5 days per year at full pay.
8. Long Service Annual Leave, an extra day every year after 5 years at Berkshire IFA have been completed, up to a maximum of 5 extra days annual leave.
9. Upgrade in Maternity / Paternity / Shared Leave – At the moment we offer statutory. After 5 years' service, we will offer 12 weeks of full pay, followed by statutory up to the end of week 39.

We do try to facilitate and accommodate reasonable adjustments needed for our recruitment process. Please do let us know how we can adequately provide support to you.