Client Administrator

Job Description

Who we're looking for?

A Client Administrator to provide administration support for Chartered Financial Advisers. The role will include servicing clients, processing applications, and supporting IFAs.

About Aspect8

We are a multi-award-winning Chartered financial planning firm with a client centric approach. In-house technology solutions, combined with market-leading discretionary fund management, enables us to deliver an outstanding holistic financial planning and wealth management service to our clients across the UK. We consider ourselves to be 'human with a digital touch.'

We are part of the Benchmark Capital Group, who power financial advisers through insight, integrated tools, services and investment solutions.

With a technology-led ecosystem of regulatory, platform, and investment services provided by Benchmark Capital, our approach is guided by delivering safety and security for clients whilst focussing on positive client outcomes. We believe that first-class client service and integrated technology are essential components for long-term success.

As part of the wider Schroders family, Benchmark Capital and Aspect8 are in the privileged position of being able to harness more than 200 years' experience in innovation and excellence.

At Aspect8 we are not just looking to build a team with the right qualifications – how we deliver is just as important as what we deliver. We are guided by the principles of creativity, quality, security, community and sustainability.

Where you'll be based

You'll be based at our one of our offices in either Winchester, Horsham or Maidstone.

We support our offices by using cutting edge software and hardware and our spacious campus facilities mean there's a great working environment for the team. With an on-site restaurant, coffee shop and gym, our campus has much to offer. And commuters can relax on our dedicated regular shuttle bus to and from Horsham's main line train station.

We know that helping you balance personal and professional commitments is a big part of that, so we're open to flexible working. Many of our staff work flexibly in many different ways, including part-time. Please talk to us at interview about the flexibility you need.

What You'll Do

- Dealing with post, scanning, photocopying, filing and emails
- Taking telephone enquiries and making appointments for advisers
- Prepare and send letters of authority and obtaining policy information for research
- Input and update client data and manage daily activities on Enable (internal CRM system)
- Prepare business packs for Advisers
- Upload and submit compliance documentation
- Mail Merges e.g transfer letters to clients joining Aspect8
- Other general admin duties as and when required

The Knowledge, Experience And Qualifications You Need

- Minimum of 12 months Administration experience within Financial Services
- Experience of Fact Find and Risk profiles would be advantageous
- R01, FA1, FA2 Qualified, or looking to qualify is an advantage
- Excellent attention to detail, accuracy and organisational skills
- Good communication skills, both verbal and written
- Intermediate to advanced excel skills desirable

What You'll Be Like

- Motivated
- Able to use initiative
- Willing to learn
- Team player

We're Looking For The Best, Whoever They Are

Benchmark Capital is an equal opportunities employer. You're welcome here whatever your socio-economic background, race, sex, gender identity, sexual orientation, religious belief, age or disability.

– .

- Our advisers enjoy comprehensive training, professional development and compliance support.
- You will also benefit from administrative and paraplanning support, enabling you to optimise the time spent serving your clients' needs.
- An attractive compensation and benefits package, a terrific working environment and a well-structured career path is on offer for our successful candidates.

The knowledge, experience, and qualifications you need

- You must be currently working as a Financial Planner, with a minimum of 3 years' experience within a Financial Advisory Practice (independent or restricted).
- The ability to analyse clients' financial needs and goals, to develop lifetime planning strategies and to proactively provide an ongoing advice service to our clients.
- The technical knowledge and experience required to provide high-quality advice across all aspects of financial planning, including tax efficient investment planning, pensions and retirement planning, protection and estate planning. A mortgage advice licence is not essential.
- Experience working with individuals and their families, entrepreneurial business owners, corporates, charities, specialist professions and managing professional intermediary clients.
- Additional specialisms in Pensions, Trusts and/or Long-Term Care and membership accreditation with professional bodies such as Resolution, SOLLA or STEP would be beneficial.
- Comfortable carrying out annual client reviews electronically or via face-to-face meetings.
- Excellent communication skills and high standards of literacy are essential.
- Committed to developing your professional skillset, ideally you will be Chartered or within a year of achieving Chartered Status.
- A thorough understanding of the Compliance, Legal, Statutory and Regulatory aspects impacting upon this area.
- Fully conversant with digital client meeting tools, such as Microsoft Teams, you will also possess solid systems experience with Microsoft 365, CRM and compliance systems.

What you'll be like

- Client focused, you will be a self-starter who is comfortable working in teams. Able to act on your own initiative and develop relationships with both new and existing clients and professional connections.
- Aspirational, you will be an individual who embraces change and understands and shares our corporate culture.
- Someone who actively contributes to the evolution of our business and its proposition through constructive client centric feedback.

We're looking for the best, whoever they are

Benchmark Capital is an equal opportunities employer. You're welcome here whatever your socio-economic background, race, sex, gender identity, sexual orientation, religious belief, age, or disability.

We look forward to meeting you.