



Client Relationship Associate

Job Description

Who we're looking for?

A Client Relationship Associate 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 Broadlands Business Campus near Horsham in West Sussex. It has high standards and international reputation, without being in the city: a big, countryside campus means life will feel a little different.

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.

We look forward to meeting you.