Client Administrator

Job Description

Who We're Looking For

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

About Benchmark Capital

Benchmark Capital powers financial advisers through insight and integrated tools, services and investment solutions that help them differentiate their client proposition.

Helping advisers to look after their clients is at the centre of everything we do. Our award-winning solutions support over 150 advice firms, with £17.1 billion of assets under advice1

With a technology-led ecosystem of regulatory, platform, and investment services, and our own financial planning business, our approach is guided by delivering safety and security for customers and focused on positive client outcomes.

We believe that first-class client service and integrated technology are essential components for long-term success. Our seamless, holistic approach works in harmony both to empower advisers and their clients and to generate tangible financial and competitive advantages.
We work with some of the most successful financial planning firms in the UK, bringing the power of technology to advice and wealth management
[1] As at 31.03.21

The base

You'll be based at our Brighton offices in the centre of Brighton, East Sussex. It has high standards and international reputation. We support our offices by using cutting edge software and mean there's a great working environment for the team.

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
- Receiving visitors
- Set up new contracts & process applications in line with FCA regulations
- 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 Advisors
- Upload and submit compliance documentation
- Mail Merges e.g. ISA allowance letters / transfer letters to clients joining Aspect8
- Other general admin duties as and when required
- Submitting business on Fusion Platform
- Report Binding
- Spreadsheets

Annual Client Reviews

- Updating client valuations
- Inputting risk questionnaires
- Generating client reports and binding them for presentation
- Diarising annual reviews and making appointments

The Knowledge, Experience And Qualifications You Need

- Administration experience within Financial services would be advantageous
- Experience of Fact Find and Risk profiles would be advantageous
- R01, FA1, FA2 Qualified, or looking to qualify an advantage
- Excellent attention to detail, accuracy and organisational skills
- Good telephone manner
- Good excel skills

What You'll Be Like

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