Aspect8

Client Support / Administrator

Job Description

Who we're looking for?

We are looking for a number of Administrators to join our successful and award-winning firm of Chartered Financial Planners and to support the Financial Planners in their role.

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 will be part of one of our regional office teams in Horsham, Brighton, Winchester or Maidstone.

− We know that helping you balance personal and professional commitments is key to both your wellbeing and our shared success, so we're open to flexible working.

Overall Purpose of the Role

As a key member of our client facing teams, your primary responsibility is to provide administrative support to our financial planning advisers in all aspects of their advice process. This will frequently also mean that you will be the clients' point of contact for administrative matters.

Your role will be providing administration support for Chartered Financial Planners in all aspects of their advice process including the following:

– Key Role Element = Prepare meeting packs and documentation/reports for client meetings and annual client reviews. Supporting the Financial Planner in the delivery of client meetings both electronically and/or in a face-to-face setting.
– Carry out day to day administrative functions, complete and submit applications, keeping data up to date on Enable (internal CRM system)
– Ensure contact with clients / providers is maintained throughout any processing
– Completing electronic AML checks
– Prepare and send letters of authority and obtain information on client policies from ceding schemes and providers to support research
– Assist with the collation of client data and documents in the construction of suitable recommendation reports and prepare related client correspondence
– New business submission and asset transfers – manage the case documentation process incl. upload and submission of required compliance documents to Enable (our internal client management system)
– Preparing and issuing documents to be signed electronically via Adobe sign
– Deal with telephone and email enquiries from client and providers
– Dealing with post, scanning, photocopying, filing and emails

The knowledge, skills, experience, and qualifications you need

- Motivated and comfortable working in teams. Able to act on your own initiative and develop relationships with both advisers, clients and professional connections.
- Ability to prioritise multiple tasks in a deadline driven environment, the ability to make decisions and to work calmly under pressure are all key attributes
- Minimum of 12 months administration experience within Financial Services, ideally within a wealth management and/or financial planning business.
- R01, FA1, FA2 Qualified, or looking to qualify, is an advantage
- Experience with Client Management Systems.
- You will be required to complete the range of educational and training tutorials on our internal client management and client asset custody and administration and dealing systems, Enable and Fusion, as well as be fully conversant with our online client portal, Wealth Platform.
- Aspirational, you will be an individual who embraces change and understands and shares our corporate culture.
- Excellent telephone manner, communication skills and high standards of literacy are essential.

We're looking for the best, whoever they are

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

Note: Winchester does not have a lift, stairs must be negotiated to access all areas of the building.

We look forward to meeting you.