



# Job Description

## Job Title: Sales Support/Group Schemes Administrator

<b>Reporting To:</b>	<b>Admin Line Manager</b>
<b>Responsibility for Others:</b>	None
<b>Location:</b>	Holmwood House, Broadlands Business Campus. Horsham
<b>Hours of Work</b>	Monday to Friday 9.00am to 5.30pm with 1 hour for lunch
<b>Any Special Requirements</b>	Occasional travel may be required in the UK

### Overall Purpose of the Role:

To provide administration support in the administration of Group Schemes for Chartered Financial Advisers. The role will include processing applications, servicing clients and supporting IFAs.

### Key Activities & Responsibilities:

- Dealing with post, scanning, photocopying, filing and emails
- Taking telephone enquiries and making appointments for advisers
- Set up new group schemes & process new joiners and leavers in line with FCA regulations
- Prepare and send letters of authority and obtaining policy information for research
- Group schemes administration – e.g Preparing and uploading monthly contribution schedules
- 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 transfer letters to clients joining Aspect8
- Other general admin duties as and when required

### Qualifications and skills:

- Minimum of 12 months Administration experience within Financial Services
- Group Scheme Administration experience would be advantageous
- 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 telephone manner
- Good excel skills

### Personal characteristics:

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