Financial Services Administrator (ref: 119)

Perspective Financial Group Ltd is an ambitious, fast paced, agile national business. With over 200 staff, 19 offices and £3.5 billion AUM, we increasingly set the standard for excellence in this sector. We are growing quickly, with more than 40 new staff joining us in the last year.

Our Statement of Purpose makes us the firm of choice for clients and staff alike:

"We provide expert, specialised financial planning and wealth management advice that enables our clients to make full and effective use of their financial resources, so they can plan for and achieve the future they desire".

Our core values explain what we mean by being 'client-centric' in everything we do:

- Doing the right thing
- Delivering
- A trusted member of the family
- Setting standards of excellence
- Teamwork

Our people are highly qualified and we invest in their development:

- Over 65 advisers, a third of whom are Chartered
- In-house Training Academy

Key facts:

- Individual, corporate and trustee clients
- Close relationships with law and accountancy firms to provide joined-up client advice
- Major investment from CBPE Capital LLP in 2019
- 6 acquisitions to date in 2021, 43 in total since we were founded in 2008

Basic Information:

Location: Warrington

Hours: Full time 9.00am – 5.00pm, Monday – Friday

Salary: £18,000 - £22,000

Benefits: 25 days holiday (rising with length of service) plus Bank Holidays, comprehensive Employee Assistance Programme with Wellbeing support, Eyecare, Pension and Life Assurance, Holiday Purchase Scheme, Cycle Purchase scheme

Role Description:

We currently have a vacancy available for a full time Financial Services Administrator to join our friendly and enthusiastic team in Warrington. The successful candidate will work in a team that deals with client queries and processing in relating to auto-enrolment, group schemes, life assurance, pensions and investments as well as liaising with product providers and covering all aspects within the general office administration to ensure a first class service is provided to internal and external parties.

Specific Responsibilities:

The key duties of the role are listed below. Due to the nature of the business, the role may also include additional responsibilities considered reasonable:-

» Back office support & processing including knowledge of auto-enrolment and group schemes,

» Assisting with reviews and customer requests as well as acting as a point of contact for our clients to deal with day to day queries,

» Screening phone calls, enquiries and requests, and handling them where appropriate,

» Preparation of client review packs,

» Processing New Business,

» Illustration requests,

» Ensure that all financial planning client administration is carried out in accordance with the Firm's procedures,

» Maintain client records on the company software and ensure the client and firm's files are well presented, accurate and compliant,

» Keep up to date with financial products and legislation,

» Comply with all company and industry guidelines, rules and regulations

What recent joiners say:

"I was initially drawn to work with Perspective having observed at first hand the values and drive they have to genuinely deliver for their clients. Their strong emphasis on recommending what is right for the client, even if inconvenient in the short term, is refreshing and something I have heard about but not always observed elsewhere in the industry."

"Since joining Perspective I have been overwhelmed by the passion across the business for genuinely putting clients at the heart of everything."

Privacy Policy

Perspective Financial Group Ltd ("us", "we") respects your right to privacy. Our Privacy Policy explains who we are, how we collect, share, and use personal information about you, and how you can exercise your privacy rights.
Our Privacy Policy is available on our website https://www.pfgl.co.uk/privacy-policy/

Experience and key requirements are:

- Previous experience working in a Financial Advice firm with knowledge of auto-enrolment and group scheme processing advantageous,
- The role requires a reliable individual who has the ability to manage and prioritise workloads,
- Role holders will be motivated, friendly and professional at all times,
- Outstanding communication skills at all levels,
- Ability to produce business correspondence, proof-read for grammar, spelling and punctuation with a high degree of accuracy,
- Analytical and problem-solving skills,
- Experience of working as part of a team and able to work remotely with colleagues often in virtual environments such as Microsoft Teams,
- Flexibility/ adaptability to cope with change,
- Confident with IT and office software packages (Word, Excel, PowerPoint etc).

Progression:

We encourage further development and financially support achievement of relevant qualifications. Opportunities for career advancement into becoming a Paraplanner and/or Financial Adviser for those who wish to consider this for their future.

How to apply:

Please send your CV and cover letter to recruitment@pfgl.co.uk quoting Financial Services Administrator (ref: 119)

Initial interviews will be held by Teams

Any unsolicited CVs will be sent at the recruitment agency's own risk and will be interpreted as 'gifts' and we have no liability to you for any fee or otherwise. We reserve the right to engage with candidates directly having not, in any way, entered into your terms and conditions. By submitting an unsolicited CV to us, or to any member of our staff, you accept these terms as the default position.