Perspective
MANAGING WEALTH

Perspective is a national financial planning and wealth management group which operates from 19 offices across the UK employing over 225 staff, including over 70 highly qualified advisers. It provides impartial, specialist advice for individuals, corporates and trustees on pensions, retirement planning, inheritance tax planning, investments and group risk and business protection matters, often working closely with other professional advisers such as accountants and lawyers.

The group differentiates itself by having a strong and ethical client-centric culture, a robust compliance approach and a clear focus on developing its pipeline of trainee adviser talent through its workplace based in-house Training Academy.

CBPE Capital LLP made a major investment in Perspective to support the Group's management team with their continued focus on providing high quality advice to their existing client base, growing organically and making selective acquisitions.

Perspective has gained a reputation as the 'acquirer of choice' for Financial Planners looking to retire and exit the industry and for larger Financial Planning firms looking to join an established and growing industry leading group.

Financial Services Administrator (ref: 136)

Location: Marlborough, Wiltshire
Hours: Monday – Friday 9.00am – 5.00pm (35 hours)
Salary: £20k to £22.5k Dependant on experience and qualifications
Benefits: 25 days holiday (rising with length of service) plus Bank Holidays, Holiday Purchase Scheme, Life Assurance, Pension and Corporate Eyecare

Role Description:

We have a fantastic vacancy for a full time Financial Services Administrator to join our friendly and enthusiastic team in Marlborough. The successful candidate will work in a team that deals with client queries relating to life assurance, pensions and investments as well as liaising with product providers and covering all aspects within general office administration to ensure a first class service is provided to internal and external parties. Full training will be given.

Specific Responsibilities:

The key duties of the role are listed below:

- 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
- Processing New Business
- Preparation of client review packs
- Illustration requests
- Back-office support
- Ensure that all financial planning client administration is carried out in accordance with the Firm's procedures and comply with company and industry guidelines, rules and regulations
- Maintain client records on the company software and ensure the client and firm's files are well presented, accurate and compliant
- Due to the nature of the business, the role may also include additional responsibilities considered reasonable

Perspective's flexible and pragmatic approach means we can create mutually beneficial acquisition deal structures and completion timescales, while priding ourselves on delivering a client-centric, ethical approach focused on long term (often multi-generational) client relationships.

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 & Skills:

The role requires a reliable individual who has the ability to manage and prioritise workloads, excellent organisational abilities are essential.

Key requirements are:

- Previous experience working in a Financial Planning firm is advantageous
- Role holders will be motivated, friendly and professional at all times
- An understanding of Model Portfolios/DFMs preferable
- Excellent planning, organisational and multi-tasking abilities are essential
- Excellent communication skills at all levels
- Ability to produce concise business correspondence, proofread for grammar, spelling and punctuation with a high degree of accuracy
- Analytical and problem-solving skills
- Flexibility/ adaptability to cope with change
- Confident with IT and office software packages including Teams, Outlook, Word, Excel and PowerPoint
- A team player with a positive attitude

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 Administrator (ref: 137)**

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