Perspective
MANAGING WEALTH

Perspective is a national financial planning and wealth management group which operates from 20 offices across the UK employing over 250 staff, including over 80 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.

Administration Team Leader (ref: 167)

Location: Maidstone
Hours: Monday – Friday 9.00am – 5.00pm (35 hours)
Salary: £30,000 - £40,000 Dependant on experience and qualifications, plus Bonus
Benefits: 25 days holiday (rising with length of service) plus Bank Holidays, Holiday Purchase Scheme, Life Assurance, Pension and Corporate Eyecare

Role Description:

We currently require a full time highly motivated, efficient Administration Team Leader with a friendly and confident manner. Candidates must have previous experience in an office management type role with proven ability to work under pressure, prioritising demanding and time sensitive workloads. 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:

- Allocate tasks and assignments, monitoring performance
- Manage internal staff relations
- 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
- Implement procedural and policy changes to improve operational efficiency
- Ensure top performance of office staff by providing them adequate coaching and guidance
- Oversee training of new employees, completing inductions and setting objectives
- Monitor KPIs and act upon the data, ensuring that the results are measured against standards
- Taking phone calls, enquiries and requests, handling them where appropriate
- Client correspondence, written and verbal
- Processing New Business
- Organising and maintaining Management diary's

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/

- Preparation of client review packs
- Arranging client meetings and managing Financial Planners diary
- Illustration requests and back-office support
- Due to the nature of the business, the role may also include additional tasks considered reasonable

Experience & Skills:

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

Key requirements are:

- Previous experience working in a Financial Planning firm is essential
- CII Level 3 Qualifications in Financial Administration preferable, if not training will be provided to achieve these
- Experience of managing a team, providing guidance, coaching and monitoring performance
- Good working knowledge of IO and Platform experience essential.
- 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

How to apply

Please send your CV and cover letter to
recruitment@pfgl.co.uk quoting Administrator (ref: 167)

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