

FS Administrator

A refreshing alternative to the vertically integrated firms which are now prevalent in the marketplace – the firm is independent with regard to ownership, provider selection and investment solutions.

Prime Wealth Planning is the financial planning arm of Prime Accountants Group, a mid-sized regional accountancy offices in Solihull, Coventry and Birmingham (the role is initially based in Solihull though the wealth team will be moving to a modern office working environment off St Paul's Sq once the renovations are complete – likely November / December 2021).

The move to Birmingham will create further opportunities in developing existing and establishing new professional relationships and client introductions to further the business's expansion plans.

The wealth planning firm is 9 years old and has enjoyed considerable year on year growth. The team is made up of 4 people, plus 2 roles currently being recruited:

- 1 Lead Adviser / Director
- 1 Associate Planner / Technical Paraplanner
- 1 Paraplanner
- 1 Administrator

The firm has ambitious expansion plans but not at the detriment of the client experience / service offering. The firm offers truly independent, holistic financial planning advice to company owners, HNWs and mass affluent clients.

The role

A key employee who supports the advice process in every element.

The use of a digital client portal and the embracing of technology to improve client experience, data security and business efficiency is a fundamental feature of the service provided and this impacts all roles in the organisation.

The candidate will have a number of years' experience in a genuinely independent IFA practice.

Please use the Solihull office for all correspondence.

Prime Wealth Planning Limited is an appointed representative of Best Practice IFA Group Ltd, which is authorised and regulated by the Financial Conduct Authority. Registered Office: 5 Argosy Court, Scimitar Way, Whitley Business Park, Coventry, CV3 4GA Registered in England and Wales No. 08003140. A list of Directors is available at the Registered Office.



The successful applicant will have the following skills and qualities:

- Will have a number of years' experience within a genuinely independent firm
- Will embrace technology and be flexible in their approach to using varied systems to support the client experience and financial planning process
- Will have experience of the full range of financial products including and used to dealing with multiple providers (products, platforms, pensions)
- Will have a focus on business efficiency, being able to simplify process wherever possible

Key tasks and responsibilities:

- assisting in the timely delivery of the advice proposition within agreed service levels
- assisting the paraplanning team and the advisers with their day-to-day administration requirements
- the gathering of personal data, pension, investment and life policy information (by telephone, email and post) and presenting of the core findings within Word and Excel format
- dealing with client inquiries in a swift and timely manner, liaising with the team and product providers where necessary
- full application completion and processing of new business
- preparing client files ahead of initial and annual review meetings
- fulfilment of investment instructions on chosen platforms
- Insurance quoting

Additional responsibilities:

- Have direct client contact where appropriate.
- Work closely with the adviser and paraplanning function to ensure standardisation of system, process and working practices.
- Meet with industry providers to maintain a wide understanding of services that can be offered to clients.

Measurable outputs:

All client deadlines are to be met or exceeded.
Firms compliance policies to be adhered to.

Practical requirements:

On occasions it may be necessary to work additional hours in order to meet client expectations and deadlines. A flexi-time system is in place accordingly.

The above job description is a guide to the work you may be required to undertake but does not form part of your contract of employment and may change from time to time to reflect changing circumstances.

Benefits package:

- Annual salary – Competitive and based on experience
- 37 hours per week
- Auto Enrolment pension scheme
- Death in Service scheme (subject to entry criteria)
- 28 days annual and statutory leave per holiday year
- The option to 'purchase' a further 10 days' annual leave in a full holiday year.