Experienced Technical Administrator

Montgomery Charles
Wealth Management

- **Location** Trowbridge, Wiltshire (Office Based)
- **Working Days** Monday to Friday 9am to 5pm **all office based no home working**
- **Starting Salary** £25,000 - £30,000 depending on experience (plus discretionary quarterly bonus)
- **Sector** Financial Services – Technical Administrator
- **Job Type** Permanent, Full Time 37.5 hours per week
- **Minimum Requirements** You will be smartly presented, offer first rate communication skills, both written and verbal and can liaise confidently with clients and providers.
- RO1, CF1, FA1 or equivalent would be advantageous, but experience counts too and the benefit of having worked within a Financial Planning Firm is highly desirable
- **To Start** TBC

Company benefits:

- **Bonus Structure** TBC after 6 months' probation
- **Company Pension** 5% enrolment
- **Holiday Entitlement** 23 days basic plus 8 bank holidays. 1 extra day 2 years' service, a further 1 for 5 years' service. Flexible sell and buy back up to 3 days.
- **Group income protection**
- **Group life cover**
- **2 paid sick days**
- **Flexible Fridays** - option to work 8am-4pm
- **Ongoing training and support with regular re-cap sessions**
- **Wellness Programme**
    - Unlimited access to a 24/7 online GP available to insured employees, their partners and children up to age 21
    - Mental health support & consultations
    - Second medical opinion
    - Physiotherapy sessions
    - Access to fitness plans and nutrition consultations
    - Bereavement support & probate help

Montgomery Charles is a highly personalised Wealth Management company who specialise in giving expert financial planning advice to Dentists, Business Owners and Private Clients. We seek a dedicated, full time Technical Administrator to join our friendly, busy and vibrant Service Team.

We are a small company with big ambitions, so it is normal practice to encourage individuals to develop ongoing 'value adding' projects alongside their everyday responsibilities. These projects intend to continually improve the way we do business. This adds an element of diversity to the average day and helps the team feel a sense of ownership within the company, so we are looking for a likeminded team player eager to contribute new ideas and a desire to make a difference.

Skills & Experience Required

The successful candidate will demonstrate high interpersonal and organisation attributes and be ready to support the rapid growth of this dynamic Financial Planning practice. Candidates should therefore have the following skills and experience:

- High level of experience in administration within a financial sector is required. For example:
    - Has worked/working for an IFA - at least 3 years' experience
    - Part of a technical team within a financial services company
    - Administration role within pensions / investments / insurance – technical knowledge of a high level
- Motivated, friendly, and professional
- Punctual, reliable and dependable.
- Ability to work in a team environment

- Attention to Detail and Accuracy is paramount
- Ability to communicate clearly with a wide variety of colleagues and providers, both verbally and in writing.
- Ability to work with discretion, sensitivity and maintain confidentiality.
- Good planning and organisational skills and ability to meet deadlines.
- Ability to prioritise and manage workload within a busy environment.
- Responsive attitude to delegation of tasks.
- Excellent IT skills in MS Word & Excel
- Professional telephone manner and superb customer service skills

Day-to-Day

The successful candidate will work within our Service department coordinated by our Client Services Manager. Our programme trains and mentors the candidate for an intensive three months, where they will be expected to work in multiple roles within the department, to get a true feel for how the company operates and evolves. In this way, the candidate should be confident in their ability to be flexible and adaptable.

The candidate's role primarily, is to assemble and organise client policy information at the necessary points in a client journey, to support the role of the Paraplanners and Advisors. More specifically the role entails the following:

- Correspond with policy providers on behalf of the client
- Correspond and be a general liaison with the client
- Submit any new business on behalf of the client
- Facilitate the annual review process of our clients
- Process new client information in preparation for their first report meeting
- Using the programmes Analytics, Prestwood and Microsoft Office to provide clients with an overview to their investment performance (training provided).
- Basic admin duties

Apply now

An exceptional opportunity for the right personality, this position is an excellent choice for a candidate looking to get stuck into a varied and demanding but hugely rewarding position.

To apply send CV to Claire: claire@montgomerycharles.co.uk expressing *specifically* how you would add value to our team and how you would help our clients 'Get more *life* out of life'©. We want to know what sets you apart from other candidates for this role.

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