

Job Description –Financial Services Administrator Apprentice

This is a fantastic opportunity to start your career within Financial Services as an Apprentice Financial Services Administrator, developing competency in the role whilst progressing your professional qualifications in the industry.

Employer Information

We are a leading financial planning firm that has experienced great growth and success in recent years and looking for an individual who is looking to start and progress in financial services.

Salary - £17,000 per annum

Primary Location - Point House, 5 High Street, Coltishall, NR12 7AA

Working hours – Monday to Friday – initially 9am to 5pm (flexible working arrangements once initial training completed)

Total Hours per week - 37.5 hours

Apprenticeship Level – Advanced – Level 3

Main Responsibilities

Summary of Role

To deal with day-to-day administration requirements of the business to deliver our Service Level Agreements and achieve great Key Performance Indicators.

Handle day to day post routines including: -

- Scanning and filing relevant post
- Franking and preparing post out

General Office Duties including: -

- Answering calls and taking messages
- Dealing with client queries
- Updating 'task' management system
- Updating our back-office system
- Welcoming visitors, making refreshments
- Managing adviser's appointments

Adviser Support including: -

- Requesting and collating plan information
- Assisting in client meeting preparation
- Preparing client letters and illustrations
- Liaising with clients and providers

Ongoing Client Reporting and Review Documentation including: -

- Producing and sending portfolio reports to clients
- Preparing review documents for adviser
- Preparing fund performance information

To progress to Trading and New Business Processing including: -

- On-line submission of pension and investment applications
- Buying and selling trades on Investment Platforms
- Submitting client's income requirements
- Fund switch trading on investment platforms
- Checking completion of all trades
- Medical underwriting applications with clients for life cover

Training information

- Level 3 Financial Services Administrator apprenticeship standard.
- The Financial Services Administrator apprenticeship is ideal for learners beginning an entry level role in the financial sector.
- As an entry level role, this apprenticeship provides the foundation knowledge, skills and experience for progression along a number of career paths.

Key Learning Outcomes:

- A broad understanding of the financial services sector
- An understanding of the role of the appropriate regulatory bodies
- The importance of relationship building with clients and colleagues
- Understanding of processes and procedures relevant to the role
- How to develop commercial awareness
- Building skills and capabilities within an organisation

Professional Qualifications:

- R01 - awarded by The Chartered Insurance Institute (CII)
Completion of R01 will provide a solid foundation for the learner and can lead on to progression to study in other areas

To help prepare the apprentice for the professional qualification, Apprentices are provided with Simply Academy's qualification resource package, alongside a structured study plan supported by a series of live revision sessions with qualified tutors.

Qualification Requirement

- Essential - GCSE or equivalent – Anticipated 5 subjects including Maths and English level 4 or above.
- Desirable – A Levels – Anticipated 2 subjects C or above or equivalent

Desired skills and personal qualities

- Communication skills
- Attention to detail
- Problem solving skills
- Presentation skills
- Administrative skills
- Analytical skills
- Team working
- Patience
- Professional email/letter writing

Closing Date – 9th August 2024

Please email CV to Liz@justfinancialplanning.co.uk or contact on 01603 266333