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# Job Description – Advice Support Administrator

**Job Title Advice Support Administrator**

**Reports to Advice Support Team Leader**

**Location Manchester**

**Purpose of the Role**

Provide administration support to the Financial Advisers in respect of new and existing business. You will monitor new business progress and chase outstanding documentation on behalf of the Financial Advisers and ensure all new business submitted is fully completed and compliant.

**Principal accountabilities** To process new applications for business both in online and paper format.

To carry out all compliance administration associated with new business, this includes ensuring forms are completed and chasing information where necessary.

To set up files for new clients and record information on database ensuring compliant files are maintained and Identity is verified.

Request collate and record information from third parties.

To update the New Business Register and Intelligent Office.

To set up new clients on database and send out policy documents as and when required.

To deal with incoming and outgoing post daily; scan, logging and distributing to the relevant individual.

To deal with any client correspondence and daily tasks regarding ongoing cases and queries from Financial Advisers ensuring they are kept up to date on their cases.

To produce Illustrations as requested along with any supporting documents required.

To compile Letters of Authority, sending out to Insurers and collating policy information when received in, then inputting policy information on to Intelligent Office.

To answer the telephone as necessary and have a friendly and professional manner at all times.

To meet and greet clients as required.

**General for all staff** The principle accountabilities will change from time to time and the post holder is required to undertake any additional duties as deemed appropriate.

Staff are required to have a Personal Development plan and to participate in training, meetings or conference considered relevant to their job.

Staff must carry out their duties with full regard to the rules, policies and procedures and conditions of service contained in the staff handbook.

To abide by the company’s policies and procedures.

To adhere to all health and safety legislation.

To undertake any other task deemed reasonable within your skill set.

**Qualifications & Experience:** Preferably holding or working toward R01 (or equivalent) and at least 6 months industry experience.

**Competencies:** Excellent organisational skills, meticulous attention to detail.

Exceptional verbal and written communication skills

Able to manage workflow and communicate effectively

Self-directed approach and strong sense of ethics

Strong Microsoft Office Skills of a standard to perform any tasks for the role (to include use of a client database, email, web, and any other systems that are required from time to time.

Knowledge and understanding of the regulatory standards

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| Values | |
| Performance | Learn from and apply feedback from Manager to improve performance  Embrace training that will benefit the customer, company, colleagues and individual  Places company goals above personal objectives. |
| Customer Service | Ensure that focus is on the needs of the customer delivering efficient and effective service delivery |
| Integrity  Honest and ethical behaviour in all activities | Uphold the highest personal  Professional standards  Committed to equality and Diversity in the workplace.  Work honestly and ethically with zero tolerance for unscrupulous behaviour  Strive to fulfil commitments  Accepts responsibility for actions and results of those actions  Makes consistent decisions regardless of situation or outside pressures |
| Transparency | Provision of clear and understandable information to customers and colleagues on all aspects of responsibilities |
| Initiative | Anticipate problems and address/escalate issues before crisis situations develop  Actively work to identify improvements areas of company processes |
| Teamwork | Encourages and supports other employees  Exhibit good listening skills  Willing to collaborate with colleagues |