



AW Financial Management LLP

Financial Planning
Independent Financial Advice
Investment & Wealth Management

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Vacancy

Outline Job Description

Trainee IFA Administrator

We are a firm of Independent Financial Advisers (IFAs) and Wealth Managers based in Sidcup. We provide advice to clients across London and the South East of England. There are currently 3 Partners and 5 other members of staff.

Initially the role will be to learn all aspects of the administration side of the business, starting with basic administration, developing into more technical aspects of the advice having been supported through training and examinations. No previous experience in financial planning will be necessary. Career progression leads an individual to initially becoming a Qualified Paraplanner providing technical support to the Advisers and then ultimately to Adviser/Partner status.

Initial Duties and Responsibilities:

- General Office Duties
- Handling phone-calls and making calls to product providers
- Updating Client Information systems
- Making notes in the client folder of all client communications including client related communications with third parties
- Keeping client files clearly marked and up to date
- Obtaining information, quotes, illustrations and product details from provider platforms
- New business processing, collating and providing management information

IT skills required

- Experience of Microsoft Word, Excel and Outlook - good and accurate keyboard skills

Personal skills required

- Good standard of written and verbal communication
- Attention to detail
- Personal & Professional integrity
- Good interpersonal skills
- Determination to learn and progress through relevant exams (and therefore in career)
- Effective time management
- Ability to critically evaluate information, probe and challenge
- A flexible and adaptable attitude towards work

Educational Background

Articulate & literate are essential qualities. Good number skills also essential (especially in using Excel). Would suit either a recent University Graduate or a non-graduate seeking a change of direction.

Salary

Basic salary plus performance related bonus, to be discussed at interview. This is a full-time post - 35 hours per week.

Closing date for applications **11th September 2020**

We do however reserve the right to close this job vacancy prior to the advertised closing date, if we feel we have found a suitable candidate.

If you wish to be considered for this role, please send your CV to our business manager Harin Fernando - his email address is:

harin@awfm.co.uk

Should your application be successful, an offer of employment will be subject to satisfactory references and proof of eligibility to live and work in the UK.

