Job Description

Job vacancy:	Administrator
Reporting to:	Head of Compliance and Operations (or as delegated)
Base:	Bath
Annual salary:	Dependent upon experience
Package:	23 days annual leave 4 x salary life assurance Group Income Protection Scheme Group Personal Pension Scheme

Job Purpose:

To provide administrative support to senior administrative staff in order to provide a comprehensive service to consultants and clients and ensure TFM targets are achieved with client satisfaction covered and exceeded.

Responsibilities:

- Request specific information from life and investment companies either by telephone, letter or e-mail to establish factual information relating to client requirements.

- Create new and update existing client investment summaries by obtaining valuations & other policy information from life and investment companies and present in the TFM Valuation Summary format.

- Process all new business application forms by photocopying all necessary paperwork and forwarding to life/investment companies (or process on-line through company website), in line with TFM standards.

- Chase outstanding business and ensure it is transacted efficiently and quickly as possible to in line with TFM standards.

- Check and process all policy documentation to ensure accuracy when received from life and investment companies, in line with TFM standards.

- Update 1st* / Intelliflo back office system and paper files daily to ensure accurate and up to date business written and client records are maintained, in line with TFM standards.

- Provide assistance with the collation of suitability reports, including ordering quotations, obtaining application forms, key features and fund fact sheets from life company (via telephone or website).

- Maintain all stationery stock levels to meet departmental needs, including copies of TFM documentation (i.e. Fact Finds, Terms of Business etc).

- Chase outstanding commissions from life/investment companies on a weekly basis as per TFM standards.

- Provide the department with ad-hoc administrative support and typing (either copy or audio) as required.

- File away all client files and paper correspondence on a daily basis.

- Maintain and develop personal knowledge of company products and regulatory requirements to enhance the service delivered to our clients.

- Place trades daily or as required on the Target Vision platform.

Target Financial Management

Key Relationships:
- TFM Team
- Life & Investment Companies
- TCG Staff
- Clients

Decision Making:
- Organisation of designated workload, subject to overview

Problem Solving:
- Prioritising workload.
- Dealing with senior admin queries

Education and Training:
- Minimum of 5 GCSE's or equivalent including grade C or above in Maths and English
- Financial Planning Certificate (FPC) Papers 1 or Certificate in Financial Planning Paper 1

Experience:
- At least 1 years experience in a Financial Services environment in an administrative role.

Skills, knowledge and competencies:

Interpersonal

- Excellent communication skills (both written and verbal).
- Attention to quality and accuracy.
- Initiative.
- A friendly nature with a strong team-playing ability.
- Flexible.
- Strong computer literacy (mandatory knowledge required in Word, Excel, Outlook Internet Explorer)
- Financial Services industry knowledge/experience

Technical

- Knowledge of Intelliflo desirable

Measurement data:
- Accuracy of client records and database.
- Senior admin staff feedback.
- Consultant feedback.
- Aged Debt
- KPIs