

progeny

Job title: Technical Administrator

Work Location: Leeds

Reporting to: Technical Administration Team Leader

Job Description:

The role of the Technical Administrator is to support and work collaboratively with Financial Advisers to ensure private and corporate clients receive an excellent level of service with all advice being fully compliant to FCA rules and regulations.

Responsibilities and Accountabilities:

- Be able to demonstrate an understanding of pensions, investments, protection and corporate schemes
- Have full commitment to open and honest business practices in line with regulatory requirements
- Support the Financial Planners in research and analysis to meet client needs and objectives
- Support the Financial Planners in preparing client financial plans and suitability reports
- Ensure client files are compliant
- Promote the profile of the business within the profession and wider communities
- Complete continuous professional development to meet best practice requirements and personal development needs
- Attend client meetings with Financial Planners as required, present cashflow to clients as required
- Any other tasks that may be allocated at the discretion of the line manager
- Ensuing support of operational and service level targets throughout workflow process
- To support Team Leader with reporting requirements

- Full understanding of the Financial Services regulatory framework, and the ethics and key principles of the advice process. Comprehensive knowledge of the systems and controls that are in place to protect the client and the company.
- Question Planner recommendations if applicable
- Meet agreed targets
- Manage trade desk requests through to completion

Skills & Qualifications:

Technical Skills:

- Develops effective and enduring relationships with colleagues through verbal/written/IT skills. Can handle and resolve issues. Can write reports that includes the necessary technical language but articulates in a way that clients understand
- Working towards the CII's Level 4 Diploma Qualification
- Overall knowledge of key areas of financial planning and advice - including investment planning, pre/at retirement planning, personal and business protection; and estate planning
- The ability to understand and interpret a cash flow forecast and summarise the key points
- The ability to calculate figures and compile data
- An understanding of the audience and how writing styles, grammar, punctuation and avoidance of jargon can enhance client understanding
- The ability to interpret complex planning into clear and concise reports
- Excellent Word skills
- Understand and apply FCA suitability requirements

Other Key Skills:

- Attention to detail and focus
- The ability to manage own time effectively
- Be able to prioritise effectively and work on own initiative
- Be able to work under pressure to deadlines
- Be able to build and maintain excellent stakeholder relationships with all parts of the business
- Be able to collate, sort and analyse multi-source feedback and negotiate with and influence stakeholders to reach final agreement
- Good verbal communicator

