progeny

| **Role Profile:** Financial Software Specialist | **Reports to:** Operations Manager |
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**About us**

Progeny is a professional advisory firm providing integrated financial and legal services for private clients, businesses, family offices and charities.

Everyone is an individual and we take care in building successful relationships providing the highest quality service. We believe in accountability and personal commitment and always seek to do the right thing for clients, colleagues and community.

We are very proud to be Progeny. Our unique blend of financial and legal expertise nurtures wealth- for today, for tomorrow and for generations to come.

**Job Purpose**

Progeny are currently entering an exciting phase of growth and succession, which has in turn lead to an investment in the expansion of Operations team. As Progeny becomes more technology driven, we are looking for an experienced Financial Software Specialist, who has specialised in Moneyinfo, Fastrak and other IFA specific systems. You will be providing technical knowledge to ensure there is a seamless process with our business critical finance systems by resolving issues, maintaining systems and providing excellent level of service to our internal team and external clients.

At Progeny, we are committed to promoting diversity, multiculturalism and inclusion. We are fully focused on equality and believe deeply in diversity of race, gender, sexual orientation, religion, ethnicity, natural origin and all other protected characteristics that make us different.

**Responsibilities & Accountabilities**

- Act as subject matter expert for specific systems, including Moneyinfo and Fastrak
- Focusing on Moneyinfo, you will offer advice, support and solutions to queries from employees and clients

** This role profile is not exhaustive; team members will be expected to carry out additional duties as required to meet the ongoing needs of the business.*

- Have full understanding of how Fastrak works and provide support to the internal team on any queries or issues when running reports
- Liaise with employees companywide and provide technical support across a variety of issues and queries
- Diagnose and resolve faults, queries and requests using telephone and remote support systems
- Complete regular audits on Moneyinfo to ensure the system is working effectively and that client portals are reflecting accurate data
- Liaise with system providers to regularly ensure continuity of service and support
- Occasional travel to other UK offices may be required
- Ensure incidents are resolved in a timely manner
- Participate in various projects, upgrades and new implementations of tools and systems
- Proactive network monitoring and troubleshooting
- Offer daily support for incidents and desktop and server troubleshooting
- Periodically review appropriateness of technologies used, provide recommendations and drive the implementation of improvements
- As our evolving technical vision is going through an exciting transformation change, you will be exposed to more opportunity to work on the latest product enhancements and more significant projects as we continuously improve

**Qualities, Skills & Attributes**

- Experience of financial systems within a financial services environment, ideally from an IFA background
- Demonstrable advanced experience of Moneyinfo and Fastrak
- Ability to communicate with employees at all levels and external suppliers on technical related issues
- Self-motivated with the ability, and resilience, to drive projects to their completion
- Excellent communication skills (written and verbal) with confidence and ability to deal with staff at all levels
- Strong analytical capability, able to rapidly understand the root cause of issues in order to resolve
- Ability to learn and understand new technologies with ease and to apply new learning to problem investigation/fault resolution
- Ability to handle concurrent tasks with appropriate priority
- Experience maintaining and administering systems and proposing innovative solutions after identifying business inefficiency
- Experience training and educating users of a system and related processes

** This role profile is not exhaustive; team members will be expected to carry out additional duties as required to meet the ongoing needs of the business.*

**Team Benefits**

- Competitive salary
- 25 days holiday plus bank holidays
- Birthday holiday & long service holidays
- Paid volunteering day
- Group Pension Scheme
- Private Health Care Scheme
- Life Assurance Scheme

**Progeny's Values**

Progeny are driven by our values; they are what collectively unite us and ensure the success of our mission "to be the most trusted professional advisory in the UK and beyond".

- **Group Wisdom**
- **Empowering Others**
- **Agility**
- **Social Responsibility**
- **Long-term Thinking**

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