

# progeny

**Role Profile:** Wealth Administrator

**Reports to:** Wealth Administrator Team  
Leader

## 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 the Wealth division. As a Wealth Administrator you will work collaboratively with Financial Planners and Paraplanners to support with a variety of administrative tasks and ensure both their portfolios of private and corporate clients receive an exceptional level of service complying with FCA rules and regulation.

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

- Support new business requirements through processing and submitting of a wide range of pensions, life assurance and investment business
- Preparation of annual review packs for Planners client meetings
- Complete administration post Planners client reviews
- Obtain illustrations and product literature such as KFD's and application forms

*\* 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.*

- Deal with changes to policies, client personal details and liaising with product providers and Platforms to ensure that all matters are resolved
- Responding to Client and Planner requests and dealing with these in a timely manner

#### **Qualities, skills & attributes**

- Experience in areas such as Platforms, Pensions, Investments, Protection and Corporate Schemes
- Good attention to detail and focus
- Proactive and enthusiastic
- Excellent organisational and customer care skills
- Time management with an ability to work under pressure to tight deadlines
- Excellent interpersonal skills

#### **Team Benefits**

- Competitive salary of up to £24k (experience dependent)
- 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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