

HOYL CORPORATE MANAGEMENT

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Hoyl Independent Advisers, and Hoyl Corporate Management, are proud to provide only bespoke, high quality independent financial advice to personal and corporate clients. We offer a full range of financial services covering all retirement planning, investment, mortgage and insurance needs.

We're proud to have been recognised as one of the top financial advisers in the UK by FTAdviser, an achievement which clearly reflects our reputation as a firm providing only high quality financial advice and also our strong belief in ethical conduct.

We seek to employ an Adviser Support Administrator who will be based at Upton House in Cromer. The successful applicant will be working alongside an established team who support our Financial Advisers.

Remuneration and other benefits are competitive.

Job Description

Job title	Adviser Support Administrator
Reports to	Adviser Support Operations Manager
Location	Cromer
Salary	£18,000 to £24,000 (dependent on experience)
Contract	Permanent
Hours	37.5 hours per week (Monday to Friday)

Role Summary

Purpose: Work closely with Advisers to build good working relations, providing support and ensuring all transactions are progressed in a timely manner

Main duties

Duties:

- Data gathering. Preparation of documents for financial planning meetings
- Ensure client records are updated on our back office system (Intelliflo).
- Report writing and obtaining Pension projections
- Preparing cases for Paraplanning to complete more complex reports.
- Performing calculations
- Providers – obtain fund values/policy info on line or through phone calls.
- Provider platforms – log on to process applications and track progress
- Preparation of comprehensive financial plan / cash flow forecasts
- New business submissions - ensuring new business is recorded correctly on our back office system in line with company and compliance procedures.
- Completing internal check sheets as necessary.
- Reviews – complete reviews following company procedures in a timely manner.
- Keeping up to date with product and legislative changes
- Ensuring compliance with FCA regulation
- Communicate with clients in a precise and polite manner
- Prioritise own tasks and monitor personal and team diaries.
- Preparation of compliance binders
- Arrange appointments for advisers
- To present a professional and positive image on behalf of the company at all times

- To attend training sessions as and when instructed
- To observe and comply with Health & Safety and company policies.

This list is not exhaustive. There may be, from time to time, additional duties at the request of your Line Manager or other Senior Manager.

Person Specification

Attributes	Essential	Desirable	Assessment method
Education / Qualifications	<ul style="list-style-type: none"> • Good standard of education including English and Maths. 		Application
Experience / Knowledge	<ul style="list-style-type: none"> • Experience in Customer Care • Microsoft Word, Excel, Outlook. • Knowledge of regulated Financial Services Industry 	<ul style="list-style-type: none"> • Awareness of equality and diversity. • Microsoft Teams communication, file storage and tasks. • Knowledge of WRAP platforms • Practical and technical knowledge of pensions • Good understanding of our back office system (Intelliflo) 	Interview
Skills	<ul style="list-style-type: none"> • Good interpersonal & communication skills • Good administrative skills. • Ability to work on own initiative • Team Player • Ability to priorities tasks. • High attention to detail 		Interview / task
Personal qualities	<ul style="list-style-type: none"> • Calm under pressure. • Pleasant manner. • Best customer outcomes mind set. • Professional attitude. • Punctual. • Enthusiastic. • Flexible approach to duties. • Self motivated and proactive. 	<ul style="list-style-type: none"> • Committed to CPD. 	Interview

Employment checks Evidence of eligibility to work in the UK will be required

More information If you would like to contact us for an informal chat, or for further information, please email hr@hoyl.co.uk

How to apply Please download an application form from our website at <https://www.hoyl.co.uk/> and email it to HR@hoyl.co.uk (application forms are available in large print)

Closing date 9.00am Monday 28th June. We reserve the right to appoint early, before the closing date, so please do not delay in applying.