

Hoyl Independent Advisers Ltd

We seek to employ an **Adviser Support Administrator** based in Cromer,

The successful applicant will be working alongside an established team who support our Financial Advisers.

Job Description

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| Job title | Adviser Support Administrator |
| Reports to | Adviser Support Team Manager |
| Location | Cromer, Norfolk |
| Salary | From £19,000 (dependent on experience) |
| Contract | Permanent |
| Hours | 37.5 hours per week (Monday to Friday) |
| Benefits | Income Protection Benefit, Death in Service Benefit, Pension |

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

Other Duties:

- 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.