Financial Planning Administrator: CN Financial Planning

An exciting opportunity has arisen to join our successful Financial Planning team as a Financial Planning Administrator, on a full-time basis. Previous experience in Financial Services is not a pre-requisite for this role. For someone new to this type of role, this provides a fantastic opportunity for the right individual looking to start a career in Financial Services as a Trainee Administrator. For someone with some experience, there is the ability to develop their career through structured training.

Working within our dedicated and hardworking Advisor Support Team, the successful candidate must be able work and deliver within a fast-paced and constantly changing working environment.

We are looking for an individual who can show an enthusiasm and positive attitude to flourish and contribute to the continued success of the business. The individual should be able to work both within a team environment and manage their own workload independently in line with the daily requirements of the business and its demands.

A full in-depth training programme will be provided to the successful individual.

The role will involve liaising with the firm's team, clients and other third parties, therefore an ability to demonstrate professionalism and effective use of communication skills is essential. The ability to multitask and prioritise effectively is also a key element. All work is IT based, and so strong IT skills and confidence with using different systems is a requirement.

Successful progression within the role can present the individual with the future opportunity to attain professional qualifications.

A minimum requirement for applicants is a minimum Grade 5 or above in GCSE Mathematics and English Language.

Key responsibilities of the role include:

- Working on Microsoft 365 and SharePoint, plus our client management system
- Assisting the team in aspects of client record keeping, and production of reports and letters supporting client advice and meetings
- Dealing with queries passed on by the team, and from client and product providers calls and emails
- Managing incoming and outgoing post/communications
- Liaising with clients, product providers, and other parties to obtain required client information
- Organising the booking of review meetings with clients, ensuring all clients are seen within required timeframes
- Updating internal systems for changes and with new information, ensuring completeness and accuracy of information
- Ensuring data is maintained on internal systems to meet regulatory requirements

Interested candidates should email their CV to andrewbaggott@cngrp.co.uk

Salary will be at market rates reflective of the experience of an individual. The benefits package offered with the role will be outlined during the interview process.

A bit about CN Financial Planning

CN Financial Planning is a leading Independent Financial Advisor firm in the area, offering a full range of financial planning advice to individuals and businesses. We have an approach of providing the best advice, and building very strong long terms relationships with all of our clients and their families. Our advisors and our team are known as some of the best in their field. This approach has seen continued growth in the business in attracting new clients.

We've got a tremendous team and a huge depth of experience. Our staff are proud to work for CN Financial Planning, and proud of what we achieve for clients, and this shines through in the service they provide. Our staff are at the heart of the business and this is reflected in our focus on training and developing the team.

CN Financial Planning is part of CN Group, a leading group of Chartered Accountants, Business Advisors and Financial Planners.

You can find out more at www.cnfp.co.uk or by Googling us.