

We have a fantastic opportunity to join our collaborative and social team.

## Administrator

### **The role:**

Joining our busy Administration Team you will provide support to our Financial Advisers and our clients. The scope and duties of the role will include:

- Submitting new business and managing cases through to conclusion
- Preparing annual portfolio reviews
- Processing Letters of Authority and obtaining the required information
- Maintaining client records via Intelliflo Office
- Dealing with ad hoc requests from Advisers and Clients
- General office duties to include welcoming visitors, booking meeting rooms, dealing with post, scanning and answering the telephone

### **About you:**

To be successful it's preferable that you have:

- 2 years' similar experience within Financial Services preferred but it is essential that you have at least 1 years' experience
- Financial Services product knowledge
- Experience of administration for Corporate Pensions and Employee Benefits is desirable but not essential
- Excellent communication skills
- High level of competency with Microsoft and experience with Intelliflo Office is highly desirable
- Good attention to detail with ability and desire to work to a high standard
- An ability to deliver excellent customer service

### **Benefits:**

- CII exam support
- Salary £20,000 to £24,000 dependent on experience and qualifications
- Opportunity to progress your career within the company

### **Want to apply?**

If you'd like to find out more about this exciting opportunity please email a copy of your CV to [careers@createfm.co.uk](mailto:careers@createfm.co.uk) and we will be in touch.