

Job title: Senior IFA Administrator

Location: Cirencester/Hybrid

Contract type: Full time, Permanent

Reports to: Practice Manager

Purpose of job: To work alongside the Financial Planner and Paraplanner providing comprehensive, high-quality technical administrative support within a client-focused POD structure. Acting as the operational anchor of the POD, this role ensures the seamless processing of new and existing business and delivers an exceptional service experience to our clients.

Core Duties and Responsibilities

Client Servicing

- Lead and drive efficient operational outcomes from the daily POD standup meetings
- Provide a friendly and professional point of contact for clients and enquiries by phone, email and in person
- Organise existing and prospective client meetings and actively manage FP's diary and workload
- Prepare client documentation in advance of and following client meetings
- Liaise with other team members on work progress per client account and keep clients informed
- Assist in client meetings when required
- Ensure that relevant service components are delivered throughout the year in a timely manner
- Ensure action points resulting from client meetings get diarised and dealt with
- Respond to first line technical client queries promptly and accurately

Client Administration

- Create and maintain accurate client records on CURO CRM, and other back office and IT systems
- Ensure all written and electronic client communications are accurately recorded and maintained in CURO and SharePoint
- Send letters of authority and gather accurate information as per business process
- Liaise with product providers to ensure timely and accurate responses to clients
- Obtain illustrations and application forms and produce portfolio valuations
- Ensure fund top ups, withdrawals switches and rebalances are carried out accurately and within agreed timescales
- Check accuracy and completeness of new business documentation
- Process and submit new business to providers and ensure applications are completed efficiently
- Record and reconcile fees

Reviews

- Organise client annual review meetings as per Refine Annual Review Process
- Prepare paperwork required for the reviews as per Annual Review Process
- Support Financial Planner at reviews if required
- Ensure agreed actions are implemented

Other responsibilities

- Comply with internal and FCA compliance policies and procedures, ensuring all client data and information remain confidential and compliant e.g., AML & GDPR.
- Stay up to date with compliance and regulatory changes, updating templates and documentation as needed

- Ensure CPD requirements are met and keep training records accurate and up to date
- Support colleagues with queries and provide help where needed
- Commit to continuous personal development
- Complete other duties as directed by management

Person Specification

D = Desirable **E** = Essential

Knowledge	
Microsoft 365 including Outlook, Word, Excel and SharePoint	E
Advanced Excel	D
Excellent technical knowledge across the financial landscape	E
Knowledge of financial planning, technical financial planning tools and modelling software e.g. Voyant	D
Experience with CURO/Power Platform	D
Experience of using AI Tools within Financial Planning e.g. Marloo	D
Skills	
Highly organised, methodical, analytical and disciplined	E
Excellent communicator both verbal and written	E
Good interpersonal skills to develop and maintain client trust and inspire confidence	E
Proactive, with strong personal accountability for completing tasks	E
Comfortable working within defined business processes	E
Positive and helpful, especially during busy periods	E
Able to work under pressure to meet deadlines when required	E
Excellent attention to detail	E
Able to achieve agreed outcomes without supervision	E
Strong ability to prioritise and plan workload effectively	E
Experience	
Minimum of three years' experience working within a financial planning environment	E
Strong knowledge of retirement & estate planning	D
Qualifications	
Diploma in Financial Planning (Level 4) (or working towards it)	D

All applicants must be eligible to work in the UK upon application.

What we offer

- Hybrid working for the right candidate
- Non-contributory pension
- 24 days holiday plus bank holidays
- Paid Christmas office shutdown
- Free Parking
- Private Medical Insurance, including Employee Assistance Programme, Remote GP Services and Cash Benefits
- Reimbursement for professional membership
- Professional Development/Qualifications Support

Hours of Work

37.5 hours per week, office hours 09:00 to 17:00. It may be necessary to occasionally work outside of normal hours to meet the demands of clients

Salary £30-35k based on experience

Application process

If we receive a high number of applications for this vacancy, we may be unable to provide an individual response to every candidate, therefore if you haven't heard back from us within 4 weeks of your application, please consider your application unsuccessful on this occasion.

How to apply:

Please apply by submitting your CV to jointheteam@proposito.co.uk along with a cover note covering the following:

- (a) What is it about working for Proposito Financial Planning that interests you.
- (b) Briefly outline how you feel you could add value to our client focused POD structure.