Graduate Client Service Administrator

Start your career Financial Services and build your future career with an established and forward-thinking City financial planning firm.

We are looking for a motivated, enthusiastic team player who can support our growing team. The ideal candidate is someone who is organised, self-starting, able to work with a team and who is willing to actively contribute with new ideas to help us drive the business forward.

This is a fantastic opportunity to take on an important role in an established and innovative financial planning firm. You will play an active part in a young vibrant team that is continually looking to develop the services we offer our clients. You will receive support to develop your skills with the opportunity to develop a long-term and fruitful career. The role you start doing could be very different from the one you will be doing in a few years time!

Working with and supporting three advisers, the tasks are important, varied and will increase with time:

* + Assisting the advisers in client and general business administration.
  + Provide a high level of technical and administrative support.
  + Help with MI Reporting and data gathering, financial transactions and trades
  + Support the advisers with research and analysis for financial plans.
  + New business submission and processing.
  + Maintain and update back-office systems.
  + Draft client correspondence, compile review packs and valuations and review meeting follow up letters & reports.
  + Meet and greet clients in the office and be the first point of contact.
  + Answer calls from clients and providers.

**Benefits**

Competitive salary, company pension scheme, generous holiday allowance plus bank holidays, flexible working, discretionary bonus.

**Essential Skills**

* + Graduate, any degree with a preference for business, financial, maths or economics.
  + A genuine interest in working in finance and working both independently and as a team.
  + Highly organised, methodical, disciplined, and meticulous.
  + Strong communication skills and be able to work on your own initiative.
  + Able to build trust, build and maintain credibility.
  + The ability to deliver excellent client service.
  + Able to cope with varying workloads and pressures.
  + Experience in Word, Excel, and Outlook.
  + Good decision-making skills.
  + Be self-motivated with strong attention to detail skills.
  + Able to listen and empathise.
  + Hardworking with a high level of follow through skills.
  + Keen to study for professional qualifications.
  + Knowledge of Benchmark Enable Financial back office system would be ideal

**About Us**

Located in the City of London, Augustine Financial Planning is a totally independent, fee based, Financial Planning business, authorised and regulated by the Financial Conduct Authority. Our trusted expertise, personal service and proactive approach enable us to provide the individual attention our clients deserve. We use a unique planning approach that focuses on our clients total financial picture. Our process allows us to create coordinated and effective solutions, designed to preserve wealth, maximise financial potential and achieve long-term goals. We have ambitious plans for the next few years, and we are a caring and supportive employer who seeks to enable our employees to be the best that they can be.

Please do apply directly, with a covering letter and CV to Katie Lovatt (klovatt@augustinefp.co.uk). Please, no agencies.