

Admin Apprentice

Reporting to

Admin Manager

Purpose of the role

The main purpose of the role is to provide comprehensive administration support to Admin Manager on a day to day basis and to support the delivery of an excellent service to clients of the firm.

Key Accountabilities

- Providing an efficient, friendly and professional point of contact for clients and enquiries by phone, email and in person;
- Answering incoming calls, taking initiative to deal with client and provider enquiries and taking/passing on messages via email in line with company procedures;
- To assist with word processing and typing.
- To complete all filing and scanning of documents and correspondence in line with company procedures.
- Inputting and maintaining accurate client records;
- Word processing and audio-typing;
- Ensuring back office systems are regularly kept up to date with correct policy and client information;
- Ordering and maintaining levels of stationery for the smooth day to day needs of the business;
- Ensuring all provider correspondence / documentation is accurate and as requested before issuing to clients;
- Producing Portfolio Valuations;
- Working collaboratively with PAs, Paraplanners and Financial Planners to ensure work in progress is completed in a timely fashion that clients receive a high standard of advice and care from IFP at all times;
- Preparation of client Ongoing Strategy meeting packs as requested in line with IFP's ongoing service procedures and standards;
- Obtaining information and valuations from product providers as required within the agreed timeframe;
- Preparation of Welcome Packs for meetings with prospective new clients;
- Preparation of Professional Partner Packs for meetings with professional connections;
- Preparation of Due Diligence Packs for new professional connections;
- Maintaining a diary/reminder system for chasing outstanding information and tasks;
- Maintaining the professionalism of the firm at all times and acting accordingly in all dealings with colleagues, clients, providers and visitors;
- To complete all filing and scanning of documents and correspondence in line with company procedures;
- To assist with outgoing/incoming post, ensuring all post is opened, date stamped and distributed to the correct person;
- Providing an efficient, friendly reception service to visitors and promptly notifying those who are being visited.

Additional Accountabilities as required by the needs of the business (e.g. to cover holidays and sickness)

- Other duties as directed by the Directors and/or management team

Skills, Traits and Competencies (the specific skills, traits and competencies necessary to be successful in this role)

- Professional and confident telephone manner
- Good organisational skills
- Good written and verbal communication skills
- Accurate with a good eye for detail
- Ability to resolve problems quickly and efficiently
- Good knowledge of True Potential and other IT systems (e.g. Microsoft Office) used to perform the role
- Good awareness of Data Protection legislation and risks
- Excellent time management and prioritisation skills
- Energetic, enthusiastic and a positive influence on others
- Good team-worker
- Takes personal responsibility for consistently delivering high quality work
- Good understanding and adherence to agreed operational processes
- Able to use own initiative to complete tasks independently
- Open and honest with colleagues, managers and Directors
- Good attendance and timekeeping
- Professional and business-like
- Productive, efficient and effective
- Ability to work under pressure

How performance will be measured

- Observation
- Feedback from colleagues, managers and Directors
- Feedback from the Apprenticeship Training Provider
- Feedback from Clients and Professional Partners
- Test results
- Examination progress