



Administrator

Full time, Permanent Position – 37 hours per week

Location: Jerroms, Blythe Valley Park, Solihull, B90 8AH

Salary: £25,000 - £30,000 per annum

Jerroms Financial Planning is a fast-growing Independent Financial Advisory firm based in the business hub of Blythe Valley Business Park and managing more than £175 million of clients funds.

An administrator is required to undertake general and database administration duties at our financial services practice based in Solihull. Previous experience of working in Financial Services is essential.

The job will include:

- Inputting information on to the database including adding new clients & plans.
- Issuing and sending out letters of authority and recording of information on receipt.
- Preparation of meeting packs for initial and client review meetings including compiling fund performance data using FE Analytics
- Updating client valuation sheets with information obtained from providers websites and by telephone.
- Monthly fund performance reporting using FE analytics.
- Scanning, filing & photocopying of documentation.
- Preparing initial quotes for protection, investment and pension plans.
- Producing recommendations letters and confirming advice.

Skills Required

- An understanding and experience of working with databases. We use Intelliflo and FE Analytics but full training will be given if not used this software before.
- A high level of accuracy and attention to detail.
- Have the ability to integrate into a team environment.
- A methodical and thorough approach to work.
- Ability to use initiative.
- Be organised and be able to prioritise work.
- Have good written and verbal communication skills.
- Must be computer literate and have previously used MS software's including Word and Excel.
- Good keyboard skills.

Staff benefits:

- 25 days holiday per annum + 8 statutory bank holidays.
- Financial support with professional qualifications.
- Onsite restaurant and chef, offering subsidised meals for staff.
- Pension scheme with Royal London (offering 100% employer NIC saving).
- Group Life: Death in service cover (4x salary)
- Free parking located onsite and in our overflow car park.
- On-the-job training for every aspect of the role.