

Exciting Opportunity for a Financial Administrator!

About (insert company name):

We are a leading financial planning firm dedicated to empowering our clients to achieve their financial goals through personalised strategies and exceptional service. With a strong commitment to integrity and innovation, we foster a collaborative environment where growth and success thrive.

Role Overview:

As a Financial Administrator, you will be an integral part of our operations team, responsible for supporting the smooth and efficient administration of client accounts and financial transactions. Your duties will include processing client paperwork, maintaining records, handling inquiries, and ensuring compliance with regulatory guidelines.

Day-to-Day Duties:

- Process client transactions including deposits, withdrawals, and transfers.
- Prepare and review client account statements and reports.
- Respond to client inquiries and provide exceptional customer service.
- Assist in the preparation of regulatory filings and compliance documentation.
- Collaborate with team members to streamline administrative processes.

What You Will Need:

- Proven experience as a Financial Administrator or similar role in financial services.
- Familiarity with financial software and proficiency in Microsoft Office Suite.
- Strong attention to detail with excellent organisational and time management skills.
- Knowledge of financial regulations and compliance procedures.

Package & Benefits:

The successful applicant will receive a basic salary of £38,000-£35,000

Our benefits package includes:

- Bonus
- Pension
- Private Medical Insurance
- 25 days Annual leave (including or excluding bank holidays)
- Support with professional development and career advancement.
- Supportive team environment with mentorship and ongoing training.
- etc

Join Us:

If you are passionate about making a difference in clients' lives and thrive in a dynamic, client-focused environment, we invite you to apply. Visit [[Careers Portal Link](#)] to apply or email your CV to [[Email Address](#)].