

## **CLIENT SUPPORT FOR CHARTERED INDEPENDENT FINANCIAL PLANNERS**

### **Description**

We are looking for a friendly and enthusiastic individual to join our busy Client Administration Team which supports the IFA and Technical Team at our Cambridge office.

We have a new senior management team and this is an exciting time to be joining our forward-thinking company.

We believe in realising everyone's potential and we are one big team where everyone's ideas are valued.

We offer a Professional Development Programme where full training is provided throughout an employee's career.

Gibbs Denley Financial Services is an award-winning high quality financial planning firm that has been offering bespoke investment advice to clients across East Anglia since 1990.

As Chartered Financial Planners, we are committed to a high level of ethical and professional standards, and we develop our staff to give them the best knowledge and skills possible. We are dedicated to providing excellent standards of customer service, professional tailor-made advice and long-term client relationships.

We offer investments on an advisory or discretionary basis, giving our clients a flexible solution.

We have been voted one of New Model Adviser's 'Top 100' financial planning firms for the fifth year running.

### **Role:**

- Administering clients' portfolios using Standard Life, Novia and Transact platforms
- Processing platform / off-platform new business by liaising with providers, clients and team
- Preparing clients' portfolio review packs for the Client Review Team
- Preparing Income Drawdown Reviews
- Dealing with platforms and product providers to obtain information about existing and potential investments
- Supporting financial planners and technical team
- Handling client queries and helping service existing clients
- Assisting with the rebalance process
- Developing and maintaining a sound working knowledge of platforms
- Maintaining Intelliflo Office system
- Greeting office visitors
- Maintaining appropriate CPD to meet CII, Chartered Corporate and Gibbs Denley requirements

## **Candidates:**

- 2+ years' experience as a financial administrator / client support, preferably at an IFA
- Ideally has some experience in using a platform
- Experience in using Intelliflo would be an advantage
- Service orientated with a general interest in providing an exceptional client experience
- Good interpersonal skills and enjoys working alongside a friendly team
- Ability to work in a busy working environment, prioritise work and meet deadlines
- Excellent administration, written / verbal communication skills and organisational skills
- Possesses a keen eye for detail
- Interested in gaining professional qualifications in Financial Services

## **Benefits:**

- Staff bonus scheme
- Holiday: 23 days per annum, increasing after 3, 6, 9, 14 and 19 years' service
- Death in Service scheme 4 x salary
- Income protection
- 5% of salary contribution into our Group Personal Pension with immediate effect
- Christmas Closure
- Professional Development Programme with financial support, recognition and reward for professional study

