

SSAS SPECIALIST FOR CHARTERED INDEPENDENT FINANCIAL PLANNERS

Description

We are looking for a proactive individual to work within our technical team based in our Cambridge office, who will administer all aspects predominantly of our SSASs.

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

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

Role:

- Proactively deliver a first class service to clients
- Administering all SSAS schemes:
- Liaising with advisers and Technical Team regarding scheme requirements
- Preparing SSAS documentation for annual reviews
- Preparing and checking documentation for new SSAS schemes
- Manually completing and balancing scheme accounts on an annual basis
- Preparing scheme allocations
- Valuing clients' investment and pension contracts and produce ad-hoc client portfolio reports
- Producing technical calculations

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FINANCIAL PLANNING

- Dealing with all stages of property purchases and loans
 - Managing HMRC and TPR online registrations and returns
 - Actively developing the company's SSAS book with the Advisory Team
 - Administering some Group Pension and Group Protection schemes
 - Setting up schemes on new back office system
 - Handling client queries
 - Keeping up to date with regulatory and legislation changes
 - Developing and maintaining a sound working knowledge of Wrap Platforms
 - Providing Management Information to Directors
 - Maintain appropriate CPD to meet Gibbs Denley requirements
- **Candidates:**
 - Must be experienced in SSAS administration
 - Knowledge of group schemes preferable, but not essential
 - Able to use initiative and confidently manage own workload
 - Must be comfortable working independently within the team
 - Service orientated with a general interest in providing an exceptional client experience
 - Good interpersonal skills are a must, as is working alongside a friendly team of dedicated individuals
 - Willing to work with advisers to actively develop the SSAS book
 - Excellent organisational and written / verbal communication skills
 - Possess a keen eye for detail
 - Ability to both interpret and produce technical information from HMRC and TPR
 - Highly proficient in Excel
 - Ability to work in a busy working environment and meet deadlines
 - 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