

## Wealth Administrator

<b>Company</b>	Walker Crips Wealth Management Ltd
<b>Job Title</b>	Wealth Administrator
<b>Department</b>	Wealth Management
<b>Type</b>	Full time Permanent
<b>Location</b>	York
<b>Salary</b>	Dependant on experience
<b>Closing Date</b>	Open until filled

### Objective

To promote and provide a high-quality service to new, existing individuals and group corporate clients.

The role will require you to work closely with and to support managers, fellow administrators, paraplanners and consultants in their work. A primary part of the position will be liaising with colleagues, clients and professional contacts such as pension providers and insurance providers.

### Key Accountabilities/Responsibilities

- Maintaining accurate records, using iO software and other databases;
- Ensuring anti money laundering checks are carried out using Smart Search;
- Producing client valuations and assisting with annual review documentation;
- Processing New Business applications/Top Ups/Switches/Pension Transfers/Bed & ISA's/Maturities. Products include Pensions, ISAs, GIAs, Bonds (both onshore and offshore), Trusts, Personal and Business Protection, VCTs, Structured Products;
- Pre-populating paperwork and application forms for clients, to accompany recommendation reports;
- Processing benefit crystallisation events from individual pensions/SIPPs;
- Assist with preparing and processing of Group Scheme renewals on an annual basis (Group Life and Group Income Protection);
- Dealing with occasional ad hoc Auto Enrolment/Group Personal Pension queries;
- Providing dedicated support to one or more Wealth Management consultants;
- Liaising with clients, professional advisers and providers;
- Assist with obtaining existing policy information for review or possible transfer;
- Ensuring all compliance matters are dealt with and client records maintained to regulatory standards; and
- Any other duties as may reasonably be required by your Line Manager/Director.

## Education & Experience

- GCSE or equivalent, a pass in English and Maths is essential;
- Good I.T skills including the use of Word, Excel and Google sheets is essential;
- Good numeracy skills are essential;
- A good level of knowledge and experience of working within a financial services environment; and
- Have a good understanding in the operation and application of life, pensions and investment products.

## Person Specification

- Ability to work independently to achieve agreed outcomes with minimal supervision;
- Attention to detail is a must;
- Be able to multitask and prioritise effectively to meet deadlines;
- Be confident and personable and be able to articulate to colleagues, clients, and professional connections;
- Demonstrate willingness to learn and take on responsibility, and
- Must have excellent interpersonal skills, verbal and written and be able to show confidence and initiative in putting forward ideas.