

Client Services Administrator

Company	Walker Crips Investment Management Limited
Job Title	Client Services Administrator
Department	Structured Investments
Type	Full time Permanent
Location	London
Salary	Depending on experience

Objective

To support the Structured Investments team in delivering the highest standards of customer service and administration.

Key Responsibilities

- Act as front-line support to financial advisers and investors, dealing with general enquiries by email and telephone.
- Deliver a comprehensive range of administrative services, including processing of investor and financial adviser applications, transfer requests and terms of business / due diligence responses.
- Maintain an efficient, organised and complete filing system.
- Issue investor and financial adviser correspondence by post and email.
- Effectively manage own workload to ensure all actions are concluded including identification and management of outstanding information for completion within agreed service levels.
- Liaise with internal operations and external providers to ensure deadlines are met and response to queries are informed and accurate.
- Support and manage team members in undertaking ad hoc project work.

Education & Experience

- University Degree desired
- 10 GCSEs (A*-C) 3 A Levels (A-C) essential
- Customer service experience essential
- General administration experience essential

Person Specification

- Excellent telephone manner and interpersonal skills when dealing with clients and colleagues.
- Good organisational skills, excellent timekeeping, attention to detail and self-discipline.
- Thorough knowledge and experience of Microsoft Office.
- Ability to assess information, review options, make appropriate decisions and understand consequences within a regulated environment. Resilient and able to work in a fast-paced, pressurised environment.
- Capable of taking responsibility for own work and actions and can show initiative and resourcefulness. A self-starter able to work with a degree of day-to-day autonomy.
- A high level of written and verbal communication skills and the ability to communicate well at all levels in a clear, appropriate and timely fashion combined with the ability to prioritise workload.