

Administrator

Company	Walker Crips Investment Management Limited
Job Title	Administrator
Department	Investment Management
Type	Full time Permanent
Location	Birmingham
Salary	Depending on experience

Objective

- To promote and provide a high-quality service to both new and existing clients. The role will require you to support the Investment Directors and Investment Managers as and when appropriate. A primary part of the position will be liaising with colleagues and clients.
- To ensure prompt and efficient completion of all duties.
- To provide assistance to other team members.

Key Responsibilities

- Production and distribution of documents and letters as required.
- Pass invoices for payment and maintain invoice records.
- Answer telephones as and when required.
- Ensure visitors are treated in accordance with Reception procedures in a hospitable manner.
- Ability to work independently to achieve agreed outcomes with minimal supervision.
- Be able to multi-task and prioritise effectively to meet deadlines.
- Maintain the filing of documents to client files in a timely manner.
- Electronic archiving
- Assisting with the mail.
- Liaise with and assist head of Birmingham office with regard to facilities management.
- Monitor stationery supplies and order fresh stationery stock as and when necessary. All orders to be signed off by an Investment Director.
- Maintaining accurate records, using AWOL and other databases
- Producing client valuations and review documentation
- Processing new business
- Providing dedicated support services to the Investment Directors and Investment Managers
- Liaising with clients, professional advisers and providers
- Ensuring all compliance matters are dealt with and client files maintained to regulatory standards
- Any other duties as may reasonably be required
- The company reserves the right to vary your responsibilities from time to time
- To comply with all company policies (dress code, time-keeping etc.

Education & Experience

- GCSE or equivalent, a pass in English and Maths is essential;
- Good IT skills including the use of Word, Excel and Google sheets is essential; and
- Minimum 1 year experience in Financial Services administration, preferably in Investment Management or Stockbroking.

Person Specification

- Interpersonal skills: Good interpersonal skills in handling clients and colleagues alike. To work effectively as part of a team.
- IT/Organisational skills: Good organisational skills, typing skills, numeracy skills, excellent timekeeping, attention to detail and self-discipline, thorough knowledge and experience of Microsoft Office products.
- Judgment & Analysis: Has the 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 is paramount.
- Initiative: 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.
- Communication: 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
- Demonstrate willingness to learn, take on responsibility and to maintain confidentiality.
- To present an efficient and professional appearance.