

Truro Administrator

Company	Walker Crips Investment Management Limited
Job Title	Truro Administrator
Department	Investment Management
Type	Full time Permanent
Location	The current role will be a hybrid role with the candidate working in the London office minimum 2 days a week. There would also be an expectation that the candidate would also need to go to Truro to cover the office when the other admin staff are on holiday.
Salary	Dependant on experience
Closing Date	Open until filled

Aim and purpose of the role

To provide administrative support for all Investment Directors and Investment Managers.

Key Responsibilities

Duties could include, but are not limited to, the following:

- Processing new business/accounts and changes to existing business/accounts and maintaining accurate and up to date information
- Working closely with various administration support departments to ensure accurate and timely records are kept for all clients. Priority being to have processes in place to ensure account set up is accurate and meets client needs
- Assisting with the preparation of 6 monthly/Annual portfolio clients reviews
- Liaising with clients, providers, other third parties and other departments as required
- Ensuring client fees are settled in a timely manner and monitoring department debtors list
- Maintaining and updating client database
- Assisting with department mailshots
- Accurate record keeping and data entry
- Any other administrative tasks within the department as and when required
- Filing of own completed work (using Papercloud Document Management System)
- General departmental filing when required
- Assist with Switchboard duties where necessary
- Undertake any additional duties as and when requested by the Line Manager/Director

Other Requirements

- Articulate with good communication skills
- Works well on own initiative
- Ability to manage own, sometimes demanding, workload and excellent time management skills
- Ability to remain calm and tactful when under pressure
- High level of care and attention to detail even when working under pressure
- Ability to work within a team and on own initiative
- Flexible
- Organized and passionate about providing quality support
- Positive outlook and the ability to get on well with other people
- GCSE pass in English & Maths
- Computer literacy is essential. Proficient in Word, Excel (including writing formulas), Gmail, Google Drive and Internet
- Experience of Document Management System and document scanning an advantage
- **Desirable:** Financial Services administration background preferably Investments