

# progeny

Progeny are currently entering an exciting phase of growth and succession, which has in turn lead to an investment in the expansion of the Operations team. As an Operations Administrator you will work collaboratively within the Progeny Operations team, providing administrative and project support.

This role will suit an individual who has previous experience within the financial services profession, preferably Wealth Management. You must be a proactive and enthusiastic individual, passionate about driving the business forward.

## **Responsibilities and Accountabilities:**

- Pull data from internal and external systems for MI and analysis
- Work with data in Excel to provide dashboard reporting
- Monitor the Operations inbox and respond to any queries as necessary
- Provide support in relation to Process Issues
- Support the Operations team in pulling together articles for internal newsletters
- Collate data for internal and external mail merges
- Liaise with platforms and providers to arrange training, resolve issues and gain updates
- Assist with process changes and roll out
- Provide general administrative support including filing, scanning and photocopying
- Provide support with all ongoing operational projects
- Such other tasks as may be allocated at the discretion of the line manager

## **Relevant Skills & Knowledge:**

- Previous success in a similar role is essential
- Good working knowledge of Microsoft packages i.e. Word, Excel and PowerPoint
- Experience of working as part of a team in a fast-paced environment
- Good communication skills both written and verbal
- Desire to learn and willingness to go the extra mile
- Experience of using platforms and CRM systems

## **Benefits:**

- Modern offices based in Leeds City Centre
- Competitive salary of up to £25k (experience dependent)
- 25 days annual leave in addition to bank holidays
- Group Pension Scheme and Private Health Care Scheme
- Private Medical (upon successful completion of probationary period)
- Life Assurance Scheme
- Working hours of 8.30am - 5pm (Mon-Fri) with a 9am start on Fridays