

# progeny

<b>Job Title: Wealth Administrator</b>	<b>Reports to: Wealth Admin Team Leader</b>
<b>Salary Band: £20k - £24k</b>	<b>Location: Leeds</b>

## Job Purpose

An excellent opportunity has arisen for an experienced Wealth Administrator to join our growing firm in Leeds City Centre. We are currently entering a huge period of growth/success, and in turn are investing our Wealth division. You will work collaboratively with Financial Planners & Paraplanners to ensure both their portfolios of private and corporate Clients receive an exceptional level of service complying with FCA rules and regulation.

## Responsibilities & Accountabilities

- Support new business requirements with processing and submitting of a wide range of pensions, life assurance and investment business
- Action renewals and put policies on risk
- Obtain illustrations and product literature such as KFD's and application forms
- Preparation of annual review packs for planner's client meetings
- Act as a contact point for client queries
- Administer corporate scheme actions such as scheme leavers, renewals and scheme member queries
- Act as telephony support where required – Contact could be with clients, internal staff members and providers
- Maintain up to date product knowledge
- Record and maintain client information
- Prepare letters of authority
- Maintain required OLA agreements on workload turnaround

Such other tasks as may be allocated at the discretion of the line manager:

- Support in the creation of MI data
- Use of internal systems
- Maintaining the accuracy of the Clients KYC record, via the firm's systems and processes
- Support in the auditing of internal processing/mapping
- Some travel may be required for training/knowledge transfer

## Person Specification

In addition to relevant experience you will need to show evidence of the following:

*\* This job description is not exhaustive; the job holder will be expected to carry out additional duties as required to meet the ongoing needs of the business*

- Experience in areas such as Platforms, Pensions, Investments, Protection and Corporate Schemes
- Experience of Intelligent Office would be an advantage
- Be familiar with Product Provider websites and online systems
- Good attention to detail and focus
- Proactive and enthusiastic
- Excellent organisational and customer care skills
- Time management
- Ability to work under pressure and to deadlines
- Ability to build and maintain excellent stakeholder relationships with all parts of the business
- Excellent interpersonal skills
- Excellent knowledge and use of Microsoft Office suite
- Honesty and reliability
- Can quickly ascertain new system knowledge

### **Benefits**

- Competitive salary of up to £24k (experience dependant)
- 25 days annual leave in addition to bank holidays
- Additional days holiday for your Birthday
- Group Pension Scheme and Private Health Care Scheme
- Life Assurance Scheme

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