HFMC WEALTH

ROLE SPECIFICATION – PA & ADMINISTRATOR (Maternity Cover)

Purpose of role

To provide exceptional quality PA and general administrative support to three Private Client Advisers. Reporting to the Senior Private Client Administrator, this is a demanding role supporting the delivery of an outstanding holistic financial planning service to new and existing HNW clients of HFMC Wealth. We're looking for a candidate who has exceptional attention to detail, the ability to work autonomously, and the aptitude and initiative to work proactively to achieve great outcomes for clients and the team. The role will suit an individual with experience as a PA, administrator or receptionist, and someone who is passionate about securing a role in the financial services sector.

This is a fixed-term appointment, covering a 52-week maternity leave, commencing later this year, leaving adequate time for a substantial handover period. For a strong candidate, there is a high likelihood of the role being made permanent following the initial period of maternity cover.

About us

HFMC Wealth is a boutique wealth planner, asset manager and employee benefits specialist. As we are independent, this allows us to provide objective advice that is aligned to client's best interests, delivered by teams steeped in financial services knowledge and experience. We have built our company on integrity and trust, because doing what is right for our clients in best for our business.

HFMC Wealth has been awarded Corporate Chartered status by the Chartered Insurance Institute – the industry gold standard for financial planners evidencing ethical practice, professional, competent and knowledgeable advice, and a commitment to providing service and support of the highest quality.

We are proud winners of the *Best Financial Adviser to Work for 2021* award and eagerly await the results of the 2023 survey.

Accountabilities

The role comprises, but is not restricted to:

- Organise and diarise meetings on behalf of the Private Client Advisers
- Manage post and all associated scanning and filing
- Manage client queries by phone and email, acting on non-technical queries, and/or distributing to other members of the team where required
- Distribute agendas and information requests prior to client meetings where required
- Chase clients for paperwork and information
- Work with the Senior Private Client Administrator to manage daily admin workflow requests
- Use internal systems to manage data and workload in line with company processes and procedures e.g. DocuSign, Intelligent Office, and Volume
- Complete application forms and send out to clients and providers, including cover letters
- Liaise with product providers to ensure all applications are received and completed, proactively managing outstanding requirements and keeping other members of the team informed
- Maintain distribution lists for central marketing and bulk communications
- Assist the Senior Private Client Administrator with valuation production and fund switches if required

- Ensure all client information (including meeting notes) is accurately maintained on internal systems, including Intelligent Office and Volume
- Run client risk tolerances and carry out anti-money laundering checks
- Ensure electronic client files are organised and updated, and easily accessible.

Experience and Qualifications

The successful candidate will have:

- 1+ years' experience in a PA, administration or reception/front of house role
- Experience of delivering client service at the highest level and ideally use of a CRM system
- Excellent IT skills with a good working knowledge of Excel
- Excellent written and verbal communication skills with an extremely high level of attention to detail.

Competencies

We need someone who can:

- Work to pressing deadlines
- Display personal resilience
- Handle the pressure of a busy team and a demanding workload
- Quickly build strong working relationships with the team
- Communicate confidently and accurately in person and in writing
- Display an enthusiastic and proactive working style
- Be exceptionally organised, with excellent time management and prioritising skills
- Be focused and motivated to deliver a consistently exceptional level of service to clients and colleagues
- Work well under own initiative and display a common-sense approach to managing workload and day-to-day priorities.

Location and hybrid working: Farringdon, London. Office working expectations are 1-2 days per week in the office medium-term, with more office days during initial training/induction.

Salary: dependent on experience, with a discretionary bonus and an excellent benefits package.

Hours of work: 37.5 hours per week, office hours 9am to 5.30pm. It may be necessary to occasionally work outside of normal office hours in order to meet the demands of client meetings and pressing deadlines.