



## **JOB DESCRIPTION – Receptionist & Office Administrator**

### **Purpose of Role**

The primary focus of this role is the delivery of an exceptional level of service to all visitors to both offices, both internal and external. We want all visitors to our offices to remember their visit for all the right reasons!

HFMC Wealth's London office is our flagship office for client meetings, as well as a hot-desking environment for staff, who are typically working in a hybrid/flexible way.

HFMC Wealth's Weybridge office is not just our registered address but the foundation of the company. This is where our IT environment is based as is the Accounts department and other critical business functions.

Reception and office administration duties are at the heart of the role, providing support and cover for our receptionists at each site. Running alongside these duties is the CRM data role. Full training will be provided as the use of a computerised Client Relationship Management system is bespoke to each firm that operates it.

The ideal candidate for this role will be someone who can learn quickly, manage a busy workload, operate autonomously when required, and deliver an exceptional client experience for both internal (employees and partners) and external clients. You will be able to demonstrate productivity and self-motivation, excellent client relationship management and communication skills, an ability to multi-task, and a desire to take on projects. The role reports to the Operations Director.

### **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 is 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 passionate about equal opportunities and diversity within the industry and have worked hard to develop a fantastic people-led culture. We are proud winners of the 2019, 2021, 2023 & 2025 *Best Financial Advisers to Work for* award.

### **Accountabilities**

*Main duties and responsibilities comprise of but are not limited to:*

*Reception cover for our HFMC Wealth offices:*

- Provide a first-class welcome to clients/visitors at the offices, ensuring all visitors are well looked after, warmly greeted, introduced to relevant members of the team and that all requirements are met during their visit, e.g. if requiring parking assistance (think Michelin star level service)
- Assist with meeting room bookings and ensure everyone is catered for (especially in busy periods)
- Answer the phone and direct calls as needed, managing general enquiries where possible
- Facilitate deliveries and third-party contractors as they come and go onsite

- Checking equipment/tech in meeting rooms is present and fully functional before meetings take place, liaising with IT and other key members of staff if there are issues
- Monitoring that meeting rooms are restocked with appropriate snacks and drinks, that client areas and rooms are kept clean and tidy at all times, and that client toilets are clean and tidy before and after meetings
- Ensure the entire office is maintained to a high standard and is presentable at all times
- Facilitate access occasionally out-of-hours to the building when required by landlords, staff, etc
- Member of the Health & Safety team, holding a fire warden and first aid in the workplace certificate (training will be provided)

#### *General administration and team support*

- Process morning post (and on occasion, collect post from sorting office in Weybridge) – open, scan, file and distribute to relevant members of the team where necessary
- Monitor the reception email accounts, actioning requests
- Assist with any other general admin duties as directed by your manager e.g. providing admin support for corporate events and assisting with various team admin requests, including printing jobs and other associated tasks

#### *CRM Administrative duties*

- Maintaining and configuration of electronic valuation updates
- Maintaining and setting up staff online access to provider sites
- Maintaining provider agencies details
- Ad hoc data & administration projects

### **Experience and Qualifications**

*The successful candidate will have/be:*

- An understanding of how to provide an exceptional client service with demonstrable experience in this area.
- Proficient in the use of Microsoft Office.
- A working knowledge of office machinery (printers, photocopiers, scanners, etc) is desirable.
- Excellent written and verbal communication skills with a high level of attention to detail.
- A confident, articulate style and be hard-working and self-motivated

### **Competencies**

*We need someone who:*

- Has a welcoming and professional attitude, appearance and manner. Who will make visitors (notably high net worth clients) feel comfortable and at ease when visiting our offices.
- Can build strong proactive working relationships with the team, for whom they will provide day-to-day support; we are a firm with a family feel and fit into the team is important
- Is enthusiastic and proactive in style, with excellent organisation, time management and prioritising skills. A reliable team player but also with the ability to work alone.
- Is punctual and professional in the workplace, and always supportive and respectful to colleagues.
- Enjoys detailed data work with emphasis on high accuracy and methodical practices.
- Happy to manage a busy workload and changing work priorities.



**Location:** Full time office based in Central London and Weybridge

**Salary:** Dependent on experience, with a discretionary bonus and excellent benefits package.

**Hours of Work:** 8:30am – 5:30pm, 5 days a week with an hour lunchbreak taken at 1pm. On the rare occasion it may be necessary to work outside of normal office hours.

*We will try to accommodate any reasonable adjustments needed for our recruitment processes, please do let us know if this applies to you and how we can adequately support you.*