June 2021

Job description

Name:
Job title: **Client Administrator**
Reporting to: **Joanna Green – Practice Manager**
Location: **60 High Street, Wellington, Somerset, TA21 8RD**

Responsibilities

- Maintenance of client records on the back-office system (currently Intelligent Office)
- Preparation of client valuation reports, client review reports and maintaining client files to satisfy compliance requirements
- Uploading file notes to the back office system, following client or company contact
- General administrative support including scanning, photocopying, letter writing and other applicable duties
- Completion, submission and follow up of applications, ensuring new business cases are processed in a compliant manner
- Requesting required documentation from clients and sending policy documents to clients
- Ordering quotes and requesting policy details for consultants
- Submitting and processing surrender requests, death claims etc
- Ensure that significant risk issues are referred to the Head of Operations where appropriate
- Make a constructive contribution to the continuing development of the team and Chetwood Wealth Management
- Proactively enhance industry knowledge, through external and internal sources

Knowledge, Skills, Experience

- Demonstrate practical awareness and basic knowledge of retail financial products and current regulatory expectations
- Analytical in solving tasks with a keen attention for detail
- Possess excellent organisational and time management skills with an ability to work under pressure and prioritise
- Deliver effective and positive communication, and demonstrate competent use of IT

Attitude & behaviour

- Desire to complete tasks to the highest standards and in a timely fashion, taking ownership and accountability for own actions
- A positive and proactive approach to work and a desire to help and support the wider team
- Calm and considered outlook in approach to problem solving