

Senior Administrator | Legal and Medical Investments

Job description

We are looking for an ambitious, efficient and conscientious individual to join our team, providing support to the independent financial advisers within the company to ensure that our clients are given a high level of continuing service.

The ideal candidate will have previous experience within financial services, working for financial advisers, as the job can be fast-paced and sometimes pressured.

We are a growing company based in Cheltenham, who specialise in giving financial advice to members of the medical and dental profession, with expertise in the NHS Pension Scheme. We currently have 27 advisers across the company, covering a vast majority of the UK.

This is a varied role; your duties will include, but not be limited to:

- Processing applications via different provider platforms
- Maintaining and updating database with relevant policy information
- Corresponding with providers across the market (in relation to investment, pension, protection and mortgage products)
- Issuing documents to clients
- Producing and updating client reports
- Drafting suitability reports for advisers
- Ensuring all records are kept up to date and compliant
- Handling incoming queries and outgoing calls to other providers and clients
- Working closely with advisers on a 1:1 basis

The successful candidate will:

- Have a good eye for detail
- Be competent with I.T systems e.g. Word, Excel and Outlook
- Have good organisational and time management skills
- Ability to work solely or as part of a team
- Have an aptitude for high accuracy
- Be well presented with a confident telephone manner

Job type: Full-time, Permanent

Salary: £21,000.00 - £26,500.00 per year (depending on experience)

Contact us to apply

If you'd like to join the team, apply today! Send your CV to: enquiry@legalandmedical.co.uk and write a short cover letter.