

Company: FixMyPension.com
Job Title: Client Services Associate
Hours: Full Time or Flexible, Permanent (22.5-37.5 hours a week)
Location: Suite 16, Building 6, Croxley Park

The Company

FixMyPension.com are well-established and highly-regarded retirement planning experts whose values include integrity; service and innovation. We are looking for ambitious people who share our values to join our expanding team; make a difference and help us grow into a national company. In return, FixMyPension.com offers interesting work; competitive salaries; enhanced holiday entitlement; a paid day-off on your birthday; training and e-learning; opportunities to develop your career and a friendly working environment with great social events. After successful completion of your probationary period, financial study support will also be provided for the relevant industry qualifications.

The Role

The purpose of this role is to help FixMyPension.com deliver excellent retirement planning solutions and customer service to our clients through a responsive; innovative and accountable approach to quality. This is also an ideal role if you would like to make the next step towards Paraplanning.

Main Job Tasks and Responsibilities

- Ensures high levels of communication with key stakeholders
- Addresses & answers clients' and intermediaries' pension related administrative queries
- Assists IFAs with annual reviews
- Processes client income requirements under instruction from the IFAs
- Processes cash movements under instruction from the IFAs
- Undertakes any projects or duties requested by the IFAs or Principals in a timely and accurate fashion
- Understands and ensures compliance with all relevant internal and external rules, regulations and procedures that apply to the conduct of the business and delivering fair outcomes to clients
- Assists in the preparation of client review packs for IFA client meetings
- Maintains recurring activities for reviews, cash balance queries and drawdown reviews

Skills and Experience

- Previous knowledge of and experience of working within the pension's arena **essential**
- Previous relevant client services administration experience gained within an IFA environment focused on financial planning for private & corporate clients encompassing pensions, investment & protection
- Demonstrates administration experience of the complete life cycle of processing client business
- High standard of competency and knowledge of CRM system and client reporting
- Previous experience of software systems and services for financial services market would be preferable
- IT systems and software (Ms Office 365) including provider websites for processing.

Values

At FixMyPension.com we look for people who can demonstrate that they share the following values:

- Integrity
- Expertise
- Service
- Innovation
- Teamwork
- Adaptability

Equality

FixMyPension.com recognises and actively promotes the benefits of a diverse workforce and is committed to treating all employees with dignity and respect regardless of race, gender, disability, age, sexual orientation, religion or belief. We therefore welcome applications from all sections of the community.

Privacy

For details of our candidate privacy notice, please see www.fixmypension.com/fixmypensionjobs/privacy