Wealth Management Administrator

Salary of £25,000 to £28,000 (DOE)

Hybrid working - partly from either our Glasgow or Gourock office blended with home working

12 month fixed term contract (Materity cover) - however as a fast-growing business there is high potential for a permanent role.

Excellent benefits including 25 days annual leave increasing with service, flexible and agile working opportunities to allow for a great work/life balance, Company Maternity and Paternity Pay, a Group Pension scheme, Study Days for relevant examinations, Cycle2Work Scheme, Employee Assistance Programme, Death in Service and Corporate Gym Discounts.

Career progression – as a growing business we have amazing opportunities for progression and we'll give you all the support you need to reach your career goals including sponsorship for qualifications. You will also receive a pay review annually with performance linked pay increases.

We are Succession Wealth, from "start-up" in 2009, we are now one of the leading independent financial planning and wealth management business' in the UK and part of the Aviva Group. We have over 600 employees and 170 Wealth Planners who provide wealth management and financial planning services to individuals and corporate clients across the UK via our network of offices.

Due to our continued growth Succession now have a fantastic opportunity for an organised and competent Administrator to join our Client Delivery team. In this fast paced and varied role you will work as part of a highly effective administration team supporting our Wealth Planners to ensure we deliver an excellent service and outstanding outcomes for our clients.

The role…

The primary purpose of the role is to work as part of a team to enable Succession Wealth Planners to maintain and develop a portfolio of high net worth clients. This is achieved through liaising with policy providers for policy details, obtaining policy illustrations, processing new business applications, tracking to completion as well as liaising directly with clients. The role holder is also expected to ensure that our client information database is accurate at all times.

On a day to day basis you can expect to be:

· Co-ordinating the Planners diaries and the arranging of client meetings.

· Preparing documentation for client appointments and meetings, including the production of annual planning meeting packs.

· Sending prepared investment information and reports to clients.

· Ensuring all data entry is completed accurately and within specified timelines.

· Taking ownership and accountability for administration including ensuring the maintenance of correct client records.

To be successful in the role you will need:

· A minimum of 2 years experience in a fast-paced Administration role

· Good literacy and numeracy skills with a high degree of accuracy

· Excellent interpersonal and organisational skills

· Working knowledge of Microsoft Word and Excel packages essential

· Desirable NVQ Level 3 in Business Administration

· The ability to demonstrate behaviours in line with Succession's Visions and Values: Client Focus, Long term and Sustainable, Integrity, efficiency, nimble and Teamwork

If you are interested in this role please email recruitment@successionwealth.co.uk