

Job Description – Technical Administrator

Why work for FPC?

FPC offers a range of financial planning services to help our clients to secure their future and protect what's important to them. We have a loyal, diverse client base and a talented team with a reputation for excellence throughout the Northwest and beyond, but we're not complacent.

As part of our planned expansion, FPC now requires an additional Technical Administrator to provide a comprehensive support service to both the Partners and Financial Planners.

You'll be based in the thriving town of Ainsdale, near Southport, easily accessible via great transport links from Liverpool and the Northwest.

If you're looking for an opportunity to be part of a growing team, in a varied role where no two days are the same, then a career at FPC could be for you.

A Day in the Life of an FPC Technical Administrator

Your day to day activities will include the following:

- **Contracts** - administration of pension contracts (including SSAS, SIPP and personal pensions), property purchases, rentals and sales, Insurance Company Bonds, General Investment Accounts and ISAs
- **Preparation** - assisting our Financial Planners with pre-meeting/pre-contract preparation including research into clients' existing arrangements and the production of compliant illustrations, supporting documentation and application forms.
- **Processing** - assisting with both new business application forms, proposals and supporting documentation and activities with existing clients such as fund switches, withdrawals and assignments of policies. Recording and updating of relevant client information in the back office system and completing any actions required following a client review meeting.
- **Office systems and administration**– providing support with the development and maintenance of the standard operating systems of the firm including general day to day office administration.

About you:

You will need:

- a minimum of 5 years' industry experience
- progress towards the Diploma in Financial Planning
- Certificate in Financial Services (preferred)
- experience of multiple sector specific online platforms and back office systems eg. IRESS (ideally)
- excellent communicative and administrative skills
- excellent analytical skills with a preference for working in a structured manner

Salary & Benefits

Salary: From £20,000 to £30,000 per annum (depending on qualifications & experience)

Hours: Permanent, full time

Location: Ainsdale, Nr Southport

Think you've got what it takes to join the team?

Contact:

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