Job Description

Service Manager

Introducing FPC

FPC provides financial planning and independent investment advice services to help our clients to live life well and secure their future.

Based in Ainsdale but with clients throughout the UK, we celebrate 40 years in business this year and are delighted to have been awarded Professional Service Firm of the Year 2022 in the Merseyside Independent Business Awards.

We pride ourselves on delivering a high-quality personal service to individuals, families and business owners. This is only possible through an advice process integrally linked to an effective team of Advisers, Planners and Service Managers.

Our Values

FPC's culture is what we feel makes us an advisory firm of choice for clients and an employer of choice for staff. We have an empowered and collaborative culture for the teams to make decisions and take responsibility for their own development and change. Our clients' needs and best interests are at the heart of all we do. We strive to be a positive force for good in our profession and to make a difference to our clients' lives and within our community.

Purpose of the Role

The role of the Service Manager is to support the advisor and planning teams with a robust control, support and execution of advice service. They are responsible for ensuring that recommended advice is consistently implemented accurately in a timely manner via a range of providers and platforms, whilst managing their own general administrative work priorities through FPC's Client Relationship Management (CRM) system.

Required Skills

- Exceptional ability to effectively use a variety of software (ie MS Office, CURO from Time4Advice, Voyant, Finametrica.
- Exceptional written and verbal communication skills.
- Tactful, trustworthy, diplomatic and able to maintain confidentiality at all times.
- Able to undertake some repetitive work, while maintaining an eye for detail and a focus on accuracy.

Job Description

The Service Manager will be responsible for:

- **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
- **Contracts** – administration of pension contracts (including SSAS, SIPP and personal pensions), property purchases, rentals and sales, Insurance Company Bonds, General Investment Accounts and ISAs
- Recording and updating of relevant client information in Curo (CRM) and completing any actions required following a client review meeting
- Supporting advisers with client meeting preparation which can include provider documentation or presentation reporting.
- **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.
- Managing your own activities linked to the execution of advice recommendations as well as supporting team members where needed.
- Supporting the continual improvement and development of existing processes and controls.

Required Experience

A Service Manager is expected to have a minimum of 3 years' experience working in an administrative capacity, in a financial planning firm that helps high net worth UK resident private clients, by delivering financial planning and investment management services.

In addition, a Service Manager should be able to demonstrate a basic understanding of the challenges and opportunities that business owners or successful professionals encounter at various times in their lives.

Required Knowledge

Service Managers must:

- have an understanding of both the financial planning process and the critical administrative elements of it
- be able to demonstrate excellent technical knowledge in relation to personal finance and investment management issues
- possess a strong awareness of the regulatory framework and its application to an independent advisory firm.
- have (or be willing to achieve) the Certificate in Financial Services and are able to demonstrate practical application of technical knowledge.

Salary & Benefits:

Salary: A competitive salary, bonus, pensions and life assurance package awaits the successful candidate.

Hours: Permanent, full time with flexible working and full IT support

Holidays: 25 days

Location: Head Office, Ainsdale, Southport

If you think you're suited to this exciting new role, please contact:

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