



Financial Planning Administrator Role At CN Financial Planning

An exciting opportunity has arisen to join our successful Financial Planning team as a Financial Planning Administrator, on a full-time basis.

Working within our dedicated and hardworking Advisor Support Team, the successful candidate must be able to work and deliver within a fast-paced and constantly changing working environment.

We are looking for an individual who can show an enthusiasm and positive attitude to flourish and contribute to the continued success of the business. The individual should be able to work both within a team environment and manage their own workload independently in line with the daily requirements of the business and its demands.

A full in-depth training programme will be provided to the successful individual.

The role will involve liaising with the firm's team, clients and other third parties, therefore an ability to demonstrate professionalism and effective use of communication skills is essential. The ability to multitask and prioritise effectively is also a key element. All work is IT based, and so strong IT skills and confidence with using different systems is a requirement.

Successful progression within the role can present the individual with the future opportunity to attain professional qualifications.

A minimum requirement for applicants is a minimum Grade 5 or above in GCSE Mathematics and English Language.

Key responsibilities of the role include:

- Follow appropriate standards within the firm at all times
- Making sure all client files are compliant on an ongoing basis
- Obtain and update client valuations in readiness for client meetings
- Monitor and issue invites for client meetings
- Update internal back-office system to ensure client details remain accurate.
- Prepare relevant paperwork for client recommendations
- Process paper and online applications on behalf of clients
- Assist in the implementation, review, and administration of group employee benefits
- Process Letter of Authority request and monitor to ensure all required information is received in a timely manner.
- Help conduct research and prepare files for upload to third parties.
- Assist with the preparation and production of the Annual Suitability Reports
- Ensure all dealings with clients and third parties are carried out in a professional and courteous manner
- Liaise with third parties to chase up information and to check any queries.
- Undertake sufficient product and market research via different tools
- Ensure all supporting documentation is maintained as per company procedures
- Making sure all client files are compliant on an ongoing basis
- Scanning and filing of the post on a daily basis
- Answering the telephone as part of the overflow for reception



Relevant skills and experience for the role are a minimum of two years experience in financial services administration roles, or similar related businesses or industries, plus be working to a basic technical level with the desire to enhance technical knowledge or qualifications in financial planning administration as appropriate.

Interested candidates should email their CV to andrewbaggott@cngroup.co.uk

Salary will be at market rates reflective of the experience of an individual. The benefits package offered with the role will be outlined during the interview process.

A bit about CN Financial Planning

CN Financial Planning is a leading Independent Financial Advisor firm in the area, offering a full range of financial planning advice to individuals and businesses. We have an approach of providing the best advice, and building very strong long terms relationships with all of our clients and their families. Our advisors and our team are known as some of the best in their field. This approach has seen continued growth in the business in attracting new clients.

We've got a tremendous team and a huge depth of experience. Our staff are proud to work for CN Financial Planning, and proud of what we achieve for clients, and this shines through in the service they provide. Our staff are at the heart of the business and this is reflected in our focus on training and developing the team.

CN Financial Planning is part of CN Group, a leading group of Chartered Accountants, Business Advisors and Financial Planners.

You can find out more at www.cnfp.co.uk or by Googling us.