



PERSON SPECIFICATION

Job Title: Financial Planning Assistant	Reporting to: Team Manager
Nature/purpose of the job role: To provide administrative and highly technical support to Advisers and senior managers, helping to provide clients with a positive, professional experience.	Main duties: To provide office-based administrative and technical support, completing all tasks relating to new business submission and servicing; data entry, analysis, and report writing; answering telephone calls and maintaining other office systems.
Location: Berkhamsted office	Hours of work: 37.5 hours per week, Monday to Friday 9.00am to 5.30pm
Salary band: Competitive, depending on experience and qualifications	
Qualifications:	
Essential: <ul style="list-style-type: none"> • GCSE English and Maths, grade C or above • Business-related A Level or Degree • Intermediary-level Word and Excel 	Desirable: <ul style="list-style-type: none"> • R01-R06 CII or equivalent • Some experience as trainee financial planning assistant/financial planning assistant or technical support would be beneficial • 1 – 2 years' experience within financial services setting, preferably an IFA
Knowledge and skills: <ul style="list-style-type: none"> • Ability to plan and organise new or familiar tasks and to use a problem-solving approach to respond appropriately to a wide range of enquiries • Use of standard applications to process, obtain and combine information – Microsoft Office (Excel, Word, PowerPoint, Publisher, Outlook) and databases • Interpret, use and evaluate numerical and graphical data • Excellent report writing skills • Good understanding of compliance standards • Ability to undertake research and assist in the reviewing of new policies • Produce high quality meeting documentation • Produce and respond to detailed written and oral communication in an office setting • Able to work on own initiative or with others on tasks with minimum supervision • Accuracy and attention to detail • Good personal time management • Analytical capability, commercial experience/judgement • Assist in the development of less experienced staff • Provide a point of contact for clients and providers when Advisers are unavailable 	