**Job Description**

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| Job Title: | Administrator/ Receptionist  |
| Reporting to: | Practice Manager |
| Location | Lower Earley, Reading |
| Hours- Full Time | Monday- Friday 9:00-5:30 |

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| **Position Overview**To provide administrative and reception support in all aspects of the day-to-day running of the business. |

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| **Experience and Competencies****Essential*** Microsoft Word, Excel and electronic diary management (Outlook).
* Relevant experience of working within a financial planning environment.

**Desirable*** Knowledge of AO.
* Advanced Excel.
* Knowledge of Financial Services Products.
* Experience working as an administrator.
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| **Responsibilities and Accountabilities** **Ad hoc projects to support the Management Team**  **Business Processing*** Ensure that all business documentation is processed accurately and efficiently, and in a compliant manner to the firm’s standards.
* Ensure all supporting documentation is maintained as per company procedures.
* Record fees.
* Produce Client Invoices
* Ensure all work is followed up promptly in line with company standards.
* Liaise with product providers to ensure timely and accurate responses to clients (progress chasing).
* Send letters of authority and gather accurate information.
* Ensure that all information requested via Loa has been received and entered into correct format for the Paraplanner to work with.
* Produce weekly Pipeline figures for Advisers

**Client Servicing**  * Provide friendly and professional point of contact for clients and enquiries.
* Create and maintain accurate client records on back office systems, platforms and any other IT systems e.g AO.
* Prepare client documentation and correspondence pre and post meetings as per business processes.
* Ensure action points resulting from client meetings get diarised and actioned.
* Ensure that relevant service standards are delivered throughout the year.

**Reviews** * Organise Prime client review meetings as per Annual Review Process.
* Prepare client review documentation as per the Annual Review Process.
* Support FPs in delivery of reviews.
* Assist in implementation of agreed action points.

G**eneral Administration** * Answering the telephone.
* Ensure back-office systems are kept up-to-date.
* Filter FP’s general information, queries, phone calls and invitations.
* Open, scan, log and allocate incoming post.
* Frank and deliver outgoing post to post office
* General correspondence.
* Other duties as directed by management.
* Assist Partners with day to day Email and diary management
* General Office duties

 **Reception*** Meet and greet visitors
* First line to answer incoming calls
* Make and serve refreshments to visitors

 **Housekeeping duties*** Generally, keep office tidy
* Load/Empty dishwasher
* Check printer has paper in each tray throughout the day
* Tidy meeting rooms after meetings have finished, clean whiteboard and keep stationery stocked
* Collect cups/glasses from upstairs office and load into dishwasher and tidy kitchen at the end of the day
* Clean and maintain the coffee machine
* Keep meetings “whiteboard” updated
* Arrange collection of recycling /shredding waste
* Keep supplies of milk, teas/coffee stocked up
* Keep supplies of cleaning supplies and every day items for office use stocked
* Buy flowers and maintain for reception
* Balance petty cash
* Dispose of paper files once business completed
* Maintain and reorder stationery supplies
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| **Person Specification*** Willing and able to follow processes in detail to ensure consistency.
* Seeks to deliver exemplary levels of customer service and empathy.
* Attention to detail.
* Works as a member of a team.
* Works in an organised, systematic manner.
* Excellent communication skills over all media.
* Prioritises tasks to meet deadlines, is flexible and adaptable.
* Computer literate.
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| **Organisation Chart**PartnersPractice ManagerParaplannerClient Relationship ManagerAdministratorFinancial Planner |

**The job description/ assignment outline is issued as a guideline to assist you in your duties, it is not exhaustive. Because of the evolving nature and changing demands of the business this job description may be subject to change. Job holders may, on occasions, be required to undertake additional or other duties within the context of this job description, and according to the needs of the business.**

**I have read and understood the above job description/assignment outline and addendum and agree to abide by the health, safety and environmental obligations contained within it.**

**Signed: ……………………………….**

**(Jobholder)**

**Date: …………………………………**