



BERRY & OAK

CHARTERED FINANCIAL PLANNERS

Practice Manager – Boston Spa, West Yorkshire

We believe that life is for living, which is why we provide holistic financial planning advice to our clients, who want to ensure they can continue to live life to the full. We achieve this through our professional and personalised client centred approach.

We are proud of our success, which has been built on a solid foundation of quality and ethics. We are based in Boston Spa and are looking to recruit an enthusiastic, driven and “smart-working” Practice Manager to support the business, working closely with the Managing Directors.

Our clients include successful business people, families and retirees based locally and countrywide who are provided with a complete range of wealth management and personalised financial planning services.

To join as a key part of our team you will need to be highly efficient, organised, and be able to multi-task and prioritise accordingly. You will relish getting things organised and getting the job done, have a ‘hands-on’ approach and be capable of independently completing required functions, whilst also liaising effectively with other team members. This is a great opportunity to make a real difference in a growing firm, in return for which we provide a flexible working environment.

Key responsibilities include:

- Supporting the Executive Board with all aspects of running a successful business
- Managing the day to day office functions
- Overseeing the provision of HR Management and Practice
- Overseeing training, performance and development of individuals
- Overseeing the provision of designated marketing activities
- Overseeing Continual Improvement policies and procedures
- Managing and implementing strategic business projects to support continual business development
- Overseeing and facilitating effective workflow throughout the business
- Ensuring that the administration elements of the business are run in a client focused, efficient and compliant manner

This is a fantastic opportunity to join our amazing firm in financial services where loyalty, dedication and enthusiasm will be recognised and rewarded.

The successful candidate can expect a generous salary plus benefits, bonus, flexibility and an extensive training and development programme.

We hire for attitude, drive and motivation; therefore all applications are encouraged and welcomed.

For further information please visit our website <https://berryandoak.com/why-work-for-us/> or send your CV and a short covering letter to sarah.elson@berryandoak.com explaining why the opportunity interests you and why you would be a valuable addition to our team.



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