



BERRY & OAK

CHARTERED FINANCIAL PLANNERS

Job Title: Client Service Administrator

Salary: £22,000 to £26,000 per annum

Job type: Full Time, Permanent

Location: Boston Spa, West Yorkshire

This is an excellent opportunity to join an award winning, forward thinking and friendly firm on a competitive salary and with genuine career progression.

To support the growth and development of our firm, we are looking for an outstanding Client Service Administrator who has the diligence and skills to become a valuable member of our client focused financial planning team.

You will be working within the client service team to provide full administrative support to our financial planners across a full range of financial products.



Company Profile

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.

This thriving and family run company is based in the heart of Boston Spa, near Leeds. We have established ourselves over a number of years, as the trusted adviser for private clients seeking expertise on managing their finances. Our business is proud to hold the "Chartered Financial Planners" Firm status, "Accredited Financial Planning Firm™ status" and the BS8577 British Standard.

We aim to give our clients the very best service and our employees the very best support in their work.

Our business is built on a firm commitment to customer care and the culture of our business reflects this.

Key Purpose of the Role

To support the growth and development of the business by providing a proactive and comprehensive administrative support service to the Financial Planners to enable them to maximise their time with clients, and ensure all clients receive a first class service.

Extremely motivated, you will possess excellent communication skills as well as being proficient in the use of Microsoft Office. With the ability to multi-task you will have excellent time management skills and will thrive on working in an exciting, yet fast-paced environment, as part of a small team.

You will be given full training on how to use our computerised back office system, deal with a variety of tasks including, processing and submission of business, policy tracking and preparing for client meetings.

Berry & Oak, Boston House, 214 High Street, Boston Spa, West Yorkshire, LS23 6AD.
T: 01937 223055 | E: info@berryandoak.com | W: berryandoak.com

Berry & Oak is a trading name of Berry & Oak Ltd, which is authorised and regulated by the Financial Conduct Authority, FRN 787328. Registered Office: Boston House, 214 High Street, Boston Spa, West Yorkshire LS23 6AD. Berry & Oak Ltd is registered in England under Number 09940516.





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Tasks will include:

- Ensuring that the business processing side runs smoothly by liaising with clients, the adviser and financial institutions
- Recording and maintaining accurate data using the company's back office computer system (Intelligent Office)
- Ensuring that tasks and responsibilities are carried out to a high standard of accuracy with set timescales
- Preparing Client review meeting packs

Job Standards for the Role

- You must have previous administrative experience in the financial services sector working in an IFA support role for a minimum 3 years.
- You must have experience in dealing with "Wrap Platforms"
- Previous experience of using Intelligent office preferred but not essential, as full training will be given.
- Experience of bespoke letter writing and a good standard of written English.
- Excellent communication skills
- Excellent computer skills – practical IT application of Excel, Word, and Outlook.
- Outstanding customer service skills with the ability to operate and communicate with high net worth clients.
- High level of attention to detail and ability to work well under pressure.

How to Apply

If you have the experience and the desire to make a difference in this expanding company, please register your interest in confidence.

The successful applicant will receive a competitive basic salary, as well as a range of benefits. You will also enjoy being part of a small friendly team, where there is the opportunity to be an integral part in the growth of the business.

Please 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.

We look forward to hearing from you.



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