

**** NEW JOB**** An Investment firm is seeking an Investment Assistant. Paying up to £40,000 and based in Victoria. If you are interested, please email your CV to emma.colville@questprofessional.co.uk

Job: Investment Assistant

Location: Victoria

Salary: £40,000

ROLE SUMMARY: Key responsibilities and expected knowledge

The Investment Assistant will provide overall administrative support for the Investment team across the client lifecycle extending but not limited to:

- Communicating with clients on a day to day basis, taking detailed and accurate telephone messages and closely monitoring emails
- Keeping the team informed at all times of client requests to ensure they are actioned in a timely manner
- Ensuring client communication adheres to company standards
- Undertaking electronic client filing: daily scanning and filing of all correspondence, and tracking client emails and telephone calls.

Other daily responsibilities:

- Opening and closing client accounts – liaising with Operations, Compliance & Tax
- Adhoc mailmerges
- Suitability Assessments - ensuring all deadlines are met
- Booking of client meetings and lunches
- Client spreadsheet – completing in a timely manner each month
- Producing client presentations
- Producing adhoc client valuation and tax reports

Quarterly Valuations – managing the process, ensuring all valuation reports are sent out by compliance deadline:

- Producing the mail merge

- Cross checking figures
- Liaising with the valuations team
- Collating reports and letters to be sent out
- Scanning and filing client letters

PERSON SUMMARY: Key skills, knowledge, behaviours and qualifications expected to fulfil the role

Skills and Capabilities

The individual is expected to demonstrate the following, working with our clients and colleagues:

- Absolute focus on client service
- Strong attention to detail and accuracy
- High standard of oral and written communication
- High standard of IT literacy (MS Office, especially Excel)
- Excellent at multi-tasking and prioritising, ability of dealing with high volumes
- Dictation