

**** NEW JOB**** A buzzy financial planning company is seeking a PA. Based in St.Paul's and paying £28,000. If you are interested please email your CV to emma.colville@questprofessional.co.uk

Job: PA

Location: St.Paul's

Salary: £28,000

KEY ROLES AND RESPONSIBILITIES:

MANAGEMENT SUPPORT

- Extensive diary management and ownership of all meetings, including ensuring that all reports, presentations and agendas are prepared for the advisers in advance.
- You will be the main contact point both in the presence and absence of the Director(s) with clients and internal staff.
- Respond to and resolve a wide range of queries from all levels of the business.
- Strong spoken and written communication with the ability to challenge queries and actions from others for Directors and advisers, making sound decisions using initiative and autonomy to ensure both are free to concentrate on high priority matters.
- Have an understanding of the Directors' business strategy in order to understand and manage Directors' priorities and provide detailed information to Directors' reports during their absence
- Ensure Director's preferred style/known wishes are conveyed, being aware of the degree of discretion that can be exercised on behalf of them when communicating and disclosing information to other colleagues in and outside of the wider team.
- Organise and attend as required, a wide range of meetings and functions at internal/external venues for Director and team, including restaurant bookings.
- Build strong working relationships with the Directors' direct reports to ensure effective team working and contingency in the event of absence.
- Support colleagues by providing holiday and short term absence cover for other back office staff

ADMINISTRATIVE SUPPORT

- Support a wide variety of additional administrative duties including the submission, issuing and payment of Director business.

- Ensure all relevant administrative tasks for Director are actioned as appropriate and within relevant time scales.
- Act as delegate where appropriate.
- Assist with drafting of client and company communications, and management of client and internal events and meetings.
- Make travel arrangements & plan itineraries as needed.
- As and when necessary, help with personal tasks and errands.

NEW BUSINESS SUBMISSION AND SERVICING

- Responsible for new business submission.
- Sending application forms to relevant providers.

3. Scanning and uploading policy documents.
 4. Updating plans on Intelligent Office. E.g. in force, transferred, matured, lapsed etc.
 5. Chasing providers to complete pension and investment cases as quickly as possible.
 6. Sending and chasing letters of authority for all necessary plan details.
 7. Sending transfer of servicing rights letters.
 8. Formatting and sending relevant Suitability Report to clients and recording on Intelligent Office.
 9. Preparing meeting rooms each morning and afternoon.
 10. Pre-paraplanning. Obtaining all relevant documentation in a timely fashion. a. Checking briefs and accepting cases.
b. Preparing analytics.
11. Responsible for servicing client portfolios.

MANDATORY RISK AND CONTROL OBJECTIVES

1. Ensure that all activities and duties are carried out in full compliance with regulatory requirements.

PERSON SPECIFICATION

KNOWLEDGE AND EXPERIENCE

1. Previous experience of managing a complex, busy and constantly changing senior leaders' diaries.
2. Proven ability to use Microsoft Office tools to a high standard (including Word, PowerPoint, Excel and Outlook).
3. Knowledge of internal systems (i.e. Intelligent Office).
4. Good level of numeracy needed for budget figures and expenses.
5. Strive to have a comprehensive understanding of financial services.
6. Understand objectives and policies of the business including current and future work projects and priorities.

SKILLS & BEHAVIOURS

1. Excellent communication and interpersonal skills - at ease speaking to senior management, clients and external stakeholders.
2. Comfortable working against tight deadlines in a dynamic environment, and with a commitment to ensuring that tasks are fully completed.
3. The ability to forward-plan and make decisions using initiative and autonomy.
4. Highly motivated and proactive, able to multi-task and use own initiative.
5. Hard working and committed to the business goals with a can-do approach.
6. Thoroughness with a strong attention to detail.
7. Flexible, but with an organised approach and can demonstrate that they are able to prioritise their workload.
8. Strong verbal and written communication skills and the ability to apply these skills to a range of audiences in a variety of circumstances.
9. Track record of exercising appropriate discretion, as required at all times when dealing with confidential issues.
10. Ability to analyse ways of working and suggesting new solutions for a streamlined administrative approach.

11. Seen to be proactively seeking ideas, advice and feedback to improve both business and own performance.

12. Taking personal ownership of tasks, sharing knowledge and improving communication across the PA community.