IQ
INVESTMENT QUORUM
UNIQUE, BOUTIQUE WEALTH MANAGEMENT

Job Description: Client Services Administrator

Department	Operations
Location	London Office with 1 day per week working from home at managers discretion
Reports to	Senior Client Services Manager
Salary	TBC based on experience
Job Type	Permanent, Full Time

We have an exciting new opportunity for a Client Services Administrator to join our award-winning wealth management company. A key role in providing a wide range of administration services to a diverse portfolio of clients.

We are looking for a dedicated and enthusiastic individual with a range of administrative experience and excellent organisation skills to support the team.

Purpose of role

- To provide a professional level of service to new and existing clients.
- Work closely with and support the Wealth Management team.
- Maintain high level of operational standards to ensure a continuous support of the business.
- Ensure that company business goals are met and exceeded.

Responsibilities

- Be the first point of contact for all incoming calls.
- Work within a team to ensure customer service levels exceed expectations.
- Work with the Wealth Managers and on occasion attend client meetings to take notes and actions on behalf of the Wealth Manager and CEO.
- Produce client investment pack ahead of their review meetings.
- Work with the Wealth Managers to produce client cash flow reports via Voyant which calculates client income and expenditure to assess future lifestyle requirements.
- Build excellent client relationships.
- Work with the Wealth Management team to onboard new clients which includes data harvest and establishing client accounts using our preferred platform partners.
- Ensure all client data is accurately recorded in all business systems including, personal, financial, lifestyle and service delivery details.
- Maintain electronic confidential records and correspondence and related material for retrieval.
- Deal with enquiries from clients and respond to day-to-day queries from relating to non-advice issues (subject to client service standards).
- Administrative, telephone and other office duties as required.

Skills and knowledge required	• Proficient with Microsoft Office, with ability to quickly learn new software and systems. • Effective communication. • Accuracy and high attention to detail. • A strong team-player who takes ownership and accepts accountability. • Flexible and adaptable to changing workloads and priorities. • An enthusiastic, proactive and self-motivated individual who shows initiative. • Absolute discretion in client affairs. • Excellent analytical, organisation, time management and prioritisation skills. • Excellent interpersonal skills for dealing with internal colleagues and clients, professional contacts and relevant platforms and a proven ability to develop and manage relationships with a diverse range of people. • The ability to achieve agreed outcomes without supervision. • To be able to comply with all office regulations. • We are looking for candidates who have had previous customer service experience, have a confident and professional phone manner and can use their initiative to solve problems.
Measurement of success	• Achievement of individual and company KPIs
Training and Self Development	• Internal and external training sessions. • Regular training sessions across the teams. • Relevant office library. • Regular 121's.
Equal Opportunities	We provide a diverse and inclusive workplace and ensure that all of our staff respect and understand individual differences. We are an equal opportunities employer and positively encourage applications from suitably qualified and eligible candidates regardless of age, disability, gender reassignment, marital or civil partner status, race, religion or belief, sex or sexual orientation.
Our Company & Culture	Investment Quorum is an independent wealth management firm, owned entirely by its staff. Our whole team is passionate in the pursuit of our mission. We plan meticulously, combining our leading financial expertise with inspirational thinking to deliver a fully personalised service. We build lasting relationships, underpinned by mutual understanding, trust and commitment. We are immensely proud of the loyalty that we inspire in our clients and of their satisfaction with our services. Almost all of our new business is referral-led – referred to us by both existing clients, our professional connections and even a number of prestigious financial firms.

If you think that you are the right candidate for this role, please email your CV, 250 words on why you think you should be considered for the position and a 2 minute video telling us a bit about yourself to lisa.ryall@investmentquorum.com. Good luck!