

Job Description – Review Services Support

Job Summary

This role is based within our Review Services Team at Sandringham Financial Partners. We are one of the market leading independent national advice firms offering a fresh and innovative approach to financial advice. A key team within the business is our Review Services team producing Annual Review packs for our advisers within the Sandringham network for their clients who have agreed an ongoing servicing arrangement.

Your duties within the team would be:

- Producing bespoke review packs for clients on behalf of Advisers within Sandringham - collating information relating to client's Investments, Pensions and Protection plans
- Assessing a client's Investments and Pensions and whether they are suitable for their needs
- Liaising with providers to obtain contract information via online facilities/telephone and e-mail
- Use of word and excel to undertake administrative tasks
- Communicating with advisers as and when necessary, via telephone and/or our internal ticketing system
- Liaising with stakeholders within the business (other areas of compliance and other departments within Sandringham)

Job Type / Category

Sandringham Financial Partners is a UK market-leader in the provision of tailored independent financial advice. Everything we do is designed to deliver the best outcomes for our personal and corporate clients.

An annual review gives the adviser the opportunity to have a discussion with their clients and identify any new advice requirements. We provide a comprehensive annual review pack detailing the performance of their financial plans and within our Review Services Team, we provide the support to our advisers to help them provide this service.

The role is full time. Initial hours of work are 9am-5pm Monday to Friday although flexible working hours would be considered. The role is based at the Head Office of Sandringham Financial Partners in Huddersfield town centre.

Required Education, Skills and Qualifications:

- Educated to at least A Level standard or equivalent (BTEC, level 3 NVQ etc)
- Similar experience of working within an office environment (although this does not have to have been within an adviser network/practice)
- The ability to be flexible in responding to the needs of the business
- Confident in using your own initiative as well as work from the instruction of others
- Strong in IT, particular MS Word and Excel