

Administrator

Opportunity

There is currently an opportunity to join Balance: Wealth Planning as an administrator working either from our office in West Bridgford, Nottingham or in Derby city centre.

The role could be full-time or part-time to suit you. Salary dependent on experience.

About you

We are looking for someone who is incredibly organised, with outstanding written and verbal communication skills. You will enjoy speaking to people by phone, get satisfaction from ticking things off your to-do list and being part of a busy team.

This role would suit someone with at least a year's experience of working in a financial advice firm who is looking for the opportunity to work for an innovative and forward-thinking company, which will support you with your qualifications and career progression.

If you don't have that experience but you're a quick learner, hard-working and looking for an opportunity to get into an incredible rewarding career, just tell us why we should consider you. What's most important is that you have the **qualities and strengths** we're looking for.

The role

Depending on your level of experience, you will be responsible for:

- Requesting and collating information.
- Data input to our systems.
- Processing transactions and seeing through to completion.
- Sending letters and emails to clients.
- Preparing application forms and client documentation.
- General client administration.

What makes us interesting

- We offer holistic financial planning advice to our clients – predominantly affluent individuals and families.
- Passive investment approach.
- Cashflow forecasting as standard.
- We charge fixed fees, not a percentage of assets under management.
- We support and encourage flexible working.
- Shortlisted for innovation awards.
- Owned by two Chartered and Certified Financial Planners.

Find out more about us: www.balancewealth.uk

If you are interested in discussing this opportunity further, please get in touch with your CV in confidence now. Rebecca Aldridge: rebecca@balancewealth.uk or 0115 7722126.