

Job Description

Job Title:	Associate IFA Administrator (Self-employed)
Responsible To:	The IFA Administrator is responsible to the Business Owner
Hours of Work:	Flexible (to be discussed)

Purpose of the Job

To provide professional high level administrative support to Financial Advisers and to respond in a timely fashion to all client requirements. To contribute to the successful operation of Cloud 9 Admin and the achievement of objectives set by the Business Owner.

Responsibilities

The duties below are not for every client and not exclusive. You will need to be flexible enough to respond to a variety of client requirements, with the support of the Cloud 9 Admin team, which may include the following:

Administrative Support to Financial Advisers

- To provide efficient administrative support to a number of IFA clients.
- To be a point of contact for IFA's, their clients, insurance providers, mortgage lenders (and client solicitors)
- Issuing of letters of authorities and chasing policy information through
- Obtain illustrations for products either on-line or over the telephone
- Maintain client back-office database, ensuring compliance and data protection procedures followed.
- Any other request made by the IFA

New Business Submissions

- To administer protection applications from pre-UW queries, through new business to commencement
- To administer mortgage applications through new business to an offer being received

Typing

- Preparation of correspondence including letters and emails
- Preparation of minutes, reports and emails using appropriate templates or producing new templates.
- Audio transcription of reports if required

Finance

- Data entry of monthly expenses using Excel, or any other online tool required by the IFA client.
- Preparation of invoices.
- Credit control of late payments.
- Maintaining accurate commission or fee logs

Communications

- Close collaboration with IFA clients to ensure they are fully supported.
- Excellent interface with the Cloud 9 Admin team ensuring they are updated at all times of any new information, changes or issues.

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Research

- Conduct research, compile data, and prepare papers for presentation to the client.
- Research of valuations and policy information in advance of IFA client meeting

General Administration

- Data entry.
- Maintaining computer filing systems.
- Updating websites.
- Manage all enquiries both internal and external.

Other

- Ensuring all internal processes are adhered to using software as required when necessary
- Attending internal training courses and team meetings as required (online)
- Be an integral part of the Cloud 9 Admin team.
- Act as an ambassador for Cloud 9 Admin, ensuring your behaviours reflects well on the company.
- To promote Cloud 9 Admin and to actively seek new opportunities.
- Any other duties as requested by the Business Owner in order to meet the changing needs and demands of the business.