

Person Specification

Associate IFA Administrator (Self Employed)

Requirement	Essential or Desirable
<p>Skills, Knowledge and Experience</p> <ul style="list-style-type: none"> • Significant experience of providing support to Financial Advisers and Mortgage Brokers (minimum 2 years) • Able to demonstrate knowledge of various Financial Adviser back-office systems • Commercially aware • Able to create written material with flair • Excellent verbal skills i.e. face to face, telephone and video conferencing • Able to organise, plan and prioritise tasks • Proficient in using Microsoft Office Outlook, Word and Excel • Excellent typing skills • 5 GCSE's or equivalent • Numeracy skills • Experience of diary management • Experience of organising travel • Financial Administration qualifications 	<p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">D</p> <p style="text-align: center;">D</p> <p style="text-align: center;">D</p> <p style="text-align: center;">D</p>
<p>Characteristics</p> <ul style="list-style-type: none"> • Passionate about customer service • Common sense approach and good judgement • High levels of integrity • Good interpersonal skills • Communicates clearly and competently • Able to listen actively • Dependable • Accountable • Able to work without supervision and capable of using own initiative • Flexible and motivated team member • Approachable and cooperative • Tenacious and resilient • Quick and enthusiastic learner • Drive to achieve results • Willingness to learn and develop new skills 	<p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">D</p> <p style="text-align: center;">D</p>
<p>General</p> <ul style="list-style-type: none"> • Desire for Cloud 9 Admin to be successful • Has own office facilities – printer & scanner, professional space, computer & software, reliable internet and phone connections • Flexible in approach to working time 	<p style="text-align: center;">E</p> <p style="text-align: center;">E</p> <p style="text-align: center;">E</p>