

Armstrong Watson – Job Description

Job Title:	Financial Planning Assistant
Reports to:	Financial Planning Assistant Supervisor / Operations Manager
SMCR Status:	Non Certified / Senior Manager Role
Direct Reports	No

1. Job Purpose:

- To provide first line administrative and technical support to the Financial Planning Consultant.
- Be the main point of contact for clients, and maintain a high level of client service at all times.

2. Relationships & Context

- Supporting the Financial Planning Consultant in the provision of financial advice to the clients of Armstrong Watson Financial Planning Limited.

3. Principal Accountabilities / Responsibilities:

- Providing relevant documentation ahead of FPC client meetings;
- Obtaining relevant research relating to proposed advice;
- Compiling suitability letters based on the advice being given;
- Processing new business;
- Ensuring accurate completion of compliance requirements;
- Responding to client queries;
- Maintaining client records on XPlan;
- Liaising with life offices and providers;
- Ensuring the administrative requirements are completed for the Client Review Process;
- Contributing to new business development;
- Proactively maintaining a high level of client service;
- Carrying out other administrative related tasks as required in support of the FPC and Armstrong Watson Financial Planning Limited generally.

4. Relevant Experience, Skills & Experience

Essential Knowledge & Understanding of the Following:

- Minimum industry experience of 2 years in a relevant role.

Good Knowledge & Understanding of the Following:

- Good written / oral communication skills;
- General IT skills;
- Ability to compile reports.

5. Qualifications

Essential:

- None

Desired:

- Certificate in Financial Planning.

This job description is not an exhaustive list of all responsibilities and skills associated with the job, but rather an indication as to the core of the position. The post holder may perform other duties and responsibilities as required.

We also expect candidates who are employed in this post to be able to evidence competency in line with our behavioural competencies list / document (which can be accessed from Jostle or by a member of the Recruitment Team upon request).