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**Job Description  
Office based, full time Administrative Team Lead role.**

Working as part of the Adviser Services Group including the Sense and Lyncombe financial adviser networks.

We are looking to add to our team at our Chesterfield office to support our growing adviser communities.

**Essential Qualifications:**

* N/A

**Desirable Qualifications:**

* N/A

**Experience requirements:**

* Minimum 1 year’s financial services experience (investments & pensions)

**Desired experience:**

* An ideal candidate will have experience using Intelligent Office (IO), but not essential

**Key Responsibilities**

* Maintenance of administration systems, including updating and ensuring accuracy of all client data
* Oversight and management of the administration team, including performance (121s, target setting, identify training needs) and absence management
* Ensuring compliance to key processes of admin team
* Facilitation of day-to-day duties of the administrator team.
* Optimisation of the administration team, including effective in-person and virtual communication
* Ability to problem solve and mitigate.
* Managing workplace culture within the team
* Ensure efficient administrative support for our advisers
* Preparation of correspondence including letters and emails to clients
* Obtaining policy information and preparation of data for client meetings
* Preparation of review letters and reports for approval by the Financial Adviser and prepare of accompanying documentation as required.
* Excellent communication when dealing with client queries to ensure a consistent standard of service
* Acting as an advocate for the ASHL group
* Liaising with clients to manage incoming queries
* To fully understand and adhere to the Consumer Duty.

**Knowledge Requirements**

* FCA/regulatory knowledge
* Commercial/organisation awareness
* Industry knowledge
* Product knowledge

**Skills Requirements:**

* Experienced line manager
* Competent use of Microsoft Office
* Excellent written and spoken English
* Ability to work within a cross-functional team
* Problem solving and decision making
* Drive and effectiveness
* Use of technology
* Job expertise
* Managing and interpreting information
* Time management

**Job Types: Full-time, Permanent (part time may be considered for the right candidate)**

**Salary: £26,000.00-£30,000.00 per year**

Benefits:

* Cycle to work scheme
* Private medical insurance
* Sick pay
* Wellness programme
* Free parking

**Schedule:**

* Monday to Friday

**Experience**

* Financial Services Compliance: 1 year (preferred)

**Licence/Certification:**

* N/A

**Work Location: Office**

**Send CVs to Andrea Clark, Head of Administration** [aclark@lyncwealth.co.uk](mailto:aclark@lyncwealth.co.uk)