



Job Profile

Job Title	Financial Planning Administrator	Name	TBC
Reports To		Region	TLD Independent Financial Service
Location	Bradford		

Purpose

TL Dallas Independent Financial Services is looking for a Financial Planning Administrator with experience working within the financial services industry.

The candidate will have a passion for providing first class administration support and someone who takes pride in their work. This is an excellent opportunity to work towards relevant Level 4 qualifications in Financial Services.

Responsibilities, Duties and Tasks:

- Providing a robust administration function to the financial planning team in an efficient and timely manner
- Supports Paraplanners with various tasks to help the team in their production of suitability reports, with a view to moving to a Paraplanning role
- Carrying out necessary technical research and analysis to support the Financial Advisers and meet client needs and objectives.
- Preparing cashflow modelling reports to assist with client retirement planning.
- Completes all work according to procedures and standards
- Collates and verifies the accuracy of information and work provided
- Assists in preparation of review and new client meeting information where required
- Supports business development through correct application of client processes and procedures
- Assists team members as required and works effectively with colleagues
- Limited client interaction at this stage but any interaction should be maintained with TL Dallas IFS Ltd conduct and professionalism standards
- Using a variety of software packages, such as Durell, Outlook, Assureweb, cashcalc, Iress
- Obtaining quotations for Life Protection business
- Assisting in the administration of employee benefit schemes such as group life, group income protection, group private medical and working to support the employee benefit team

Essential Skills:

- Ability to prioritise workload and identify when they need support to achieve goals
- Understanding of financial planning, client advice processes and industry knowledge
- Ideally you will need to have previously worked within a Financial Services environment in a similar role
- Accuracy and attention to detail
- Strong numerical skills
- Clear and concise communication skills – oral and written

- Ability to meet deadlines/work within restricted timescales
- Flexible and reliable team member
- Ability to work on own initiative to achieve required results
- Collaborative and inclusive approach to work

Desirable Skills:

- Experience in working as or with a paraplanner

Compliance/Training and Development:

- Maintains up to date knowledge of the market and regulation changes
- CPD hours annual attainment
- Completion of work in a compliant manner, and satisfy the auditing regime in the business

Qualifications: Academic/Professional/Regulatory:

- 5 GCSE's or equivalent (Including Maths and English)

Corporate Governance

- Adheres to Conduct Risk standards and all other TL Dallas Policies and Procedures
- Understands and complies with all FCA regulations and principles applying to the role

