

IFA Administrator

Reporting to Head of Administration

Location Exeter

Summary Prydis is a multi-discipline professional practice, affording you the opportunity to work alongside other professionals, helping to provide clients with integrated solutions to meet their needs.

Responsibilities, defined but not limited to...

- Assistance with onboarding new advisers
- Preparing annual reviews for advisers
- Obtaining policy information once company authority is in place
- Ensuring fees are paid correctly on policies
- Tracking new applications and liaising with companies where necessary
- Tracking transfers, surrenders & withdrawals
- Ensuring client files are in order and compliant, making up files for new clients
- General SIPP/SSAS administration
- Phoning providers, advisers and clients to gather information
- General admin duties, e.g. printing, scanning, binding, data entry to CRM
- Attendance at appropriate training courses and seminars (where relevant)
- Attendance at Prydis "Lunch and Learn" seminars (where relevant)
- Training and supervision of junior staff (where relevant)
- Providing assistance to the Prydis Wealth team (where appropriate)

Relevant skills

Ideal candidates will be able to demonstrate a high level of computer literacy across the main elements of the Microsoft suite of products. They should also possess good prioritisation and time management skills, to ensure adviser and client expectations are met.

How to apply

Please email your CV and a covering letter to harriettaylor@prydis.com.

Prydis Group are an Equal Opportunities Employer.



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