NAVIGATUS
SUPPORTING FINANCIAL PLANNERS

CLIENT SUPPORT MANAGER

LOCATION: SALISBURY OR HOME-BASED

HOURS: FULL TIME (35 HOURS) OR PART-TIME

SALARY: DEPENDENT ON QUALIFICATIONS AND EXPERIENCE

We are a friendly outsourced paraplanning company working with small financial planning firms across the UK. Since our launch in May 2017, we have been expanding and we are now looking for another Client Support Manager to join us and help us support our growing client base.

In this role, you will work with financial planners and their teams, as well as your Navigatus colleagues, to assist with all aspect of day to day financial administration on an outsourced basis.

You will work as part of a small team to deliver high-quality customer service to financial planners, their firms and their clients and ensure all agreed service standards are met, sufficient resources are allocated at all times to maximise productivity, and the work produced is of the highest quality.

WHAT WILL IT INVOLVE?

- You will deal effectively with queries from financial planners, their clients and other parties through effective communication.
- You will be responsible for ensuring that any work produced meets the agreed service and quality standards and follows agreed processes and procedures.
- Where relevant, you will ensure that the financial planner’s chosen back office system is correctly updated with accurate information and maintained at all times.
- Working with the paraplanners, you will discuss the client’s objectives and the work required by the financial planner, help identify and obtain the information necessary to compile the financial report and, where required, ensure smooth and efficient implementation of any recommendations provided.
- You will liaise with product providers and other third parties to gather additional information required to assess the client’s needs and formulate recommendations.
- You may be asked to assist in identifying areas for planning and sourcing solutions suitable to meet the financial planner’s client’s needs and objectives. This may include assisting in the preparation of tax calculations where necessary.
- You will obtain information, quotes, illustrations and product details and provide comparisons for analysis by the paraplanning team.

- You will assist and provide support with a wide range of administrative functions, including new business processing, income matching, collating and providing management information and organising future planning meetings with the client on behalf of the financial planner.

HOW DO YOU KNOW THIS IS THE RIGHT ROLE FOR YOU?

We'd love to hear from you if:

- You have a passion for financial planning and achieving the best outcomes for the client – we always do what's right, not what we're asked to do.
- You are happy to work independently and without supervision – we don't do micromanagement here.
- You are naturally good at prioritising and planning your own workload, and you work well under pressure – things are generally very busy and sometimes get even busier.
- You have an eye for detail, and you're happy to peer-check the work of others while being gracious about the feedback you receive about your own work.
- You have the confidence to challenge politely and constructively.
- You enjoy using different types of software and a range of research tools on a daily basis. You're comfortable working with documents, and you're no stranger to building a spreadsheet or two.
- You have a creative and open-minded approach to everything you do, and you are willing to continuously learn and develop.

WHAT ABOUT EXPERIENCE AND QUALIFICATIONS?

Your starting salary will depend on the combination of your experience and technical qualifications.

However, it is more important for us that you have the right attitude and sufficient passion and enthusiasm for the role and that you can successfully work as part of our team than a set number of years' experience or specific qualifications.

While we will currently struggle to take on anyone who is brand new to the industry, if you've taken and successfully passed some financial planning exams in the past or you have worked as a financial administrator for a while, and you feel this is the role for you, we want to hear from you.

WHAT DO WE OFFER IN EXCHANGE?

We want you to love coming to work (whether you're actually coming to our Salisbury office or making the treacherous journey to the desk in your spare bedroom), and while only you can make it happen, we will help by:

- Providing a friendly and supportive working environment.
- Not expecting you to hit the ground running – there's always a period of adjustment when changing roles, whether you've been doing the job for 2 or 20 years.
- Giving you a varied and challenging workload – we can promise that time will fly!
- Encouraging you to constantly learn by taking exams, attending professional events, or volunteering your knowledge and skills in the wider financial planning community.

- Giving you the flexibility to adjust your hours as needed during the week – we know that life happens!

In addition, every Navigatus crew member benefits from:

- Pension scheme
- Group life cover
- 25 days of annual leave
- Plus a day off on your birthday (provided it falls on a weekday)
- And an extra day off at Christmas
- Exam support and additional study leave before the big day if you choose to study
- PFS membership (or equivalent), subject to annual CPD requirements being met
- Access to a range of other staff benefits, including telephone and online GP for the whole family, virtual gym glasses, and lots of useful discounts.

HOW TO APPLY?

If this sounds like a role for you, please email Aleks at aleks@navigatus.co.uk explaining why you feel we're right for you and enclosing a copy of your CV (or a link to your LinkedIn profile if that's easier).