



### **Role Profile**

Client Excellence Administrator

### **Location**

Gloucester, GL3 4AH

### **Salary**

Up to £25,000 DOE

### **Contract Type**

Permanent / Full-Time

Blackfinch Group is an award-winning investment specialist with a heritage dating back over 25 years. A trusted provider, we work in partnership with advisers. Our businesses cover tax-efficient solutions, early stage investing, managed portfolio services, property financing and renewable energy. As an environmental, social and governance (ESG) investor, we work for a positive impact. We're proud to be entrusted with over £550 million in assets under management and administration.



## Purpose of the Role

The team has an essential role in delivering support and excellent service to our clients which include advisers and end investors. As well as working closely with other teams across the business. As part of the Client Excellence team you will champion world-class service standards whilst building on your technical knowledge of all Blackfinch products and the wider environment in which Blackfinch sits. This is an excellent introductory role to the company and paves the way for you to evolve within Blackfinch in the future, offering many career development opportunities.

## Key Responsibilities

- Application Processing – The accurate and timely processing of application forms: email communications; manage outstanding requirements; check anti- money laundering; check application form information against SalesForce and add new details. Meet service standards for acknowledgement. Continual case review until conclusion.
- General Enquiries – The professional answering of adviser and client phone call or email enquiries within service standard. Accurate responses. The appropriate referral or redirection to other teams. Clarity of task ownership when passing on enquiry to another member of staff.
- Dealing (pre & post) – The accurate and timely processing of pre and post dealing processes and systems.
- Valuations, Fees & Withdrawals – The accurate and timely production of ad- hoc and quarterly valuation requests.
- TEP – Timely dialogue liaising with the TEP life offices.
- General Product Administration – The accurate and timely processing of: Adviser Novations; Share reconciliations; Death events; 2 year holding process and issue of letters.
- General Administration Support. Processing post; Banking; Literature requests; ; Scanning documents.
- Data Integrity – The accurate input, maintenance and checking of systems data, spreadsheets, file saving, and Salesforce records.
- Working with the Client Excellence Manager, you will play a key part in helping us to move to a more automated client engagement model via automation, robotics and straight through processing (STP).
- Compliance with company policies, regulatory, professional, and legal requirements.
- Any other ad hoc duties that maybe required.

# Skills & Qualifications

## Essential Skills and Qualities

- Strong and accurate communication skills, both written and on the phone.
- Extremely accurate with an eye for detail.
- Excellent organisational skills.
- High quality interpersonal skills.
- Computer literate, with a knowledge of Microsoft programmes, as well as the ability to use database and CRM systems.
- Strong and flexible work ethic.
- Self-motivated and tenacious.
- An appetite for learning and their own development.

## Desirable Experience

- Experience in a professional services environment, preferably Financial Services.

## Desirable Qualifications

- Hold, or willing to work towards, relevant industry qualification i.e. CF1.

If you think you have the skills and experience we're looking for, we would love to hear from you. Please upload your CV and record responses to a few questions using the 'APPLY NOW' button below. The hiring manager for this opportunity will review your CV and responses and will contact you shortly.

[\*\*APPLY NOW\*\*](#)

If you require any further information about this role, we're here to help, contact us on **01452 717070**.

## Our Values

At Blackfinch we're working to make a difference in the world. We partner with advisers to meet client and business aims. Inspired by the work of Charles Darwin, we're named after one of Darwin's finches, which influenced his theories of evolution.

Our values of 'adapt', 'evolve' and 'thrive' run through everything we do. We continually adapt to changing markets, providing evolved products so that our customers can thrive. These values inform our work as an ESG investor, working towards a more sustainable future.



Offering a supportive environment, championing continuing professional development and sponsoring staff for qualifications.



One of the friendliest businesses in financial services, supporting our people, customers and investee companies.



Providing opportunities to progress plus to take up benefits, and to get involved in sponsorship and charity work

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