

April 2022

## **Job description**

**Name:**

**Job title:** Client Administrator

**Reporting to:** Joanna Green – Practice Manager

**Location:** 60 High Street, Wellington, Somerset, TA21 8RD

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**CHETWOOD**  
WEALTH MANAGEMENT

### **Responsibilities**

- Maintenance of client records on the back-office system (currently Intelligent Office)
- Preparation of client valuation reports, client review reports and maintaining client files to satisfy compliance requirements
- Uploading file notes to the back office system, following client or company contact
- General administrative support including scanning, photocopying, letter writing and other applicable duties
- Completion, submission and follow up of applications, ensuring new business cases are processed in a compliant manner
- Requesting required documentation from clients and sending policy documents to clients
- Ordering quotes and requesting policy details for consultants
- Submitting and processing surrender requests, death claims etc
- Ensure that significant risk issues are referred to the Head of Operations where appropriate
- Make a constructive contribution to the continuing development of the team and Chetwood Wealth Management
- Proactively enhance industry knowledge, through external and internal sources

### **Knowledge, Skills, Experience**

- Demonstrate practical awareness and basic knowledge of retail financial products and current regulatory expectations
- Analytical in solving tasks with a keen attention for detail
- Possess excellent organisational and time management skills with an ability to work under pressure and prioritise
- Deliver effective and positive communication, and demonstrate competent use of IT

### **Attitude & behaviour**

- Desire to complete tasks to the highest standards and in a timely fashion, taking ownership and accountability for own actions
- A positive and proactive approach to work and a desire to help and support the wider team
- Calm and considered outlook in approach to problem solving