



Financial Planning Administrator

Salary £23,000 to £25,000 per annum depending on skills and experience

Plus 7.5% company pension contribution

After probation: travel allowance and option to split your working week between working from home and in the London office

Discretionary Bonus Scheme

We have an opportunity for an experienced Administrator to support the Financial Planning team and the wider Business Development team.

We are based in the 'Walkie Talkie' building in the City of London.

Your main duties and responsibilities will include:

- ✓ Invoicing Accredited Firms and managing the benefits spreadsheet.
- ✓ Managing and invoicing Corporate Firms. Creating spreadsheets of benefits and managing quarterly reports.
- ✓ Managing the Financial Planning inbox.
- ✓ Working with the Membership team to track CFP's from achieving level 7 through to membership.
- ✓ Creating Bitmark reports on clients and membership.
- ✓ Attend CFP events.
- ✓ Sitting the Fundamentals of financial services exam.
- ✓ Attending work experience in a client firm.
- ✓ Producing annual client review reports.
- ✓ Supporting Academy and new initiatives for example Financial Planning Festival.
- ✓ Supporting the wider business development team when required.

You should have the following skills and experience which you may have gained through voluntary activities or paid employment:

- Relevant work experience
- Excellent organisation, planning and communication skills
- Attention to detail
- Ability to juggle multiple projects
- Excellent inter-personal skills and the ability to deal with people at senior level
- A flexible attitude and able to work to deadlines
- IT skills - Word, Excel and PowerPoint skills
- A minimum of GCSE grades A-C / 5-9 in English and Maths
- A team player

We offer a competitive remuneration package, which includes:

- 7½% company contribution into a personal pension, in addition to your own contribution of 1½% via salary exchange
- Life insurance and income protection insurance
- 26 days' leave per annum (which includes three days at Christmas)

- After one year's service, private medical insurance cover
- A travel allowance after passing probation and option to split your working week between working from home and in the London office
- A sports club allowance

Please send your CV, salary expectation and availability to Karen Dalton, Assistant Director, HR at jobs@cisi.org

We value the contribution that employees with different views and experience bring to the Institute and are committed to promoting equality, inclusion and diversity. We hope to receive applications from a wide range of talented people irrespective of their race, religion or belief, gender, age, gender identity, neurodiversity, disability, sexual orientation, ethnic origin, political belief, social class, relationship status or caring responsibilities.

The Chartered Institute for Securities & Investment is the leading professional body for securities, investment, wealth and financial planning professionals. Formed in 1992 by London Stock Exchange practitioners, we have a global community, which aims to promote high standards of competence and integrity to more than 40,000 members in 116 countries. We are also the main examining body for the sector, offering our internationally recognised exams globally.

Its purpose is "To champion lifelong learning and integrity, raising individual standards of knowledge, skills and behaviour globally to enhance public trust and confidence in financial services."

For more information on the CISI, please see our website at www.cisi.org