Client Manager Support - Liverpool

We are looking for a Client Manager Support to join our team in Liverpool! Please send your application to infoliverpool@astutepwltd.co.uk.

About Us

At Astute Private Wealth Ltd, we seek to provide first class financial planning and advice to clients across the North West, North Wales and beyond.

We aim to build strong, enduring relationships with our clients, and take pride in helping them to achieve their goals through comprehensive lifestyle financial planning. We want to provide our clients with confidence for their future, so that they can enjoy their lives now.

We have offices in St Paul's Square - Liverpool, in Ewloe, and in Knutsford, and have been awarded the title of "Chartered Financial Planners" by the Chartered Insurance Institute.

About the Role

The role of the Client Manager Support is to support the Client Manager, and in some instances the Client Support Team (CST). You will assist the Client Manager to allow them to prepare recommendations and suitability reports in line with company policy, including preparing and maintaining client records.

You will also assist the Client Manager with the client review process, both pre and post meeting.

Key Responsibilities and Outputs

- Support the Client Manager Team in research and analysis to meet client needs and objectives
- Support the Client Manager Team in preparing client suitability and cash flow reports
- Help maintain business flow
- On occasion, assist and provide support with administrative functions, for example: new business processing, income matching, collating and providing management information, and organising future planning meetings with the client on behalf of the Financial Planner/Client Manager

- Liaise with product providers and other third parties to acquire additional information that may be required in order to assess the client's needs and to formulate recommendations
- Assist in identifying areas for planning and sourcing solutions suitable to meet the client's needs and objectives
- Obtain information, quotes, illustrations and product details, and provide comparisons for analysis
- Assist CST in preparing client financial reviews
- Support the Client Manager in managing the research and analysis of financial products to meet client requirements
- Commit to continuous personal development, keeping knowledge up to date and retaining supporting records for review
- Ensure that any business conducted is done in a responsible and compliant manner, meeting all legislative requirements.
- Manage, record and monitor client reviews on behalf of the Financial Planner and Client Manager
- Assist the Client Manager to deal effectively with queries from clients through effective communication
- Work with both the Financial Planner and client in implementing and maintaining the Personal Finance Portal (PFP) via Intelliflo.

About You

You'll work well as part of a team: it is important that the Client Manager and Client Manager Support work well together as a strong team, offering assistance to clients irrespective of whether or not the Financial Planner is available.

You'll be working towards, or have the desire to work towards the level 4 diploma in regulated financial planning.

You'll have 1-2 years' experience in the financial services industry.