

Financial Planning Administrator

Job title: Financial Planning Administrator

Start date: ASAP

Location: Nottingham, UK

Salary: dependent on experience

Job conditions: This is a full-time, permanent position

About the role

We are seeking a Financial Planning Administrator to join our ever-growing team. As a Financial Planning Administrator at Fiscal Engineers, you will provide efficient and effective administration that promptly enacts and supports the advice given to and authorised by our clients. Responsibilities include but are not limited to; processing of dealing instructions and new business applications, obtaining valuations, and assisting in producing Wealth Plan Update reports. You will be regularly monitoring and chasing up progress on applications and other transactions with platforms and providers with the aim of efficiently processing our client's instructions and immediately raising issues or potential issues arising with the relevant client service team.

About you

Passionate about client care and dedicated to excellence, you have an appetite for learning and personal growth along with a willingness to support and champion others - you are a team player. With a keen eye for detail and possessing a 'can do/will do' attitude, you instinctively take ownership and want to work with a firm that has the highest possible ethical standards and client expectations that fuel its reputation for being one of the most highly regarded and respected boutique wealth management firms in the UK.

You will ideally have several years' experience as an administrator in a financial or professional services firm. You want to 'get on' and join a family of outstanding professionals in one of the most exciting, progressive, and energetic firms to work for with a fully packed agenda for future growth.

About us

We are an award-winning, boutique wealth management firm based in the centre of Nottingham, dealing with high-net-worth individuals. We are expert advisors with many years of shared knowledge and experience and we are growing.

True relationship is central to our thinking. When our clients entrust matters of the greatest personal importance, we need to ensure that our team are not just technically capable but also wise enough to understand.

Our values

At Fiscal Engineers, we live our core values of:

- Making a Difference
- Care Deeply
- Get you
- Get the job done

Our Key Behaviours

At Fiscal Engineers we do not assess performance against targets, instead we believe that we get the best results that we require from teamwork. Our key behaviours which we all commit to are:

- We always do the right thing
- We support and respect one another
- We embrace change



- We give our very best

Fiscal Engineers' benefits

- city centre location with car parking provision
- generous salary/bonus and profit share scheme
- group scheme benefits - pension scheme, death in service and income protection plan
- career and personal development pathways
- dedicated coaching and learning support
- wellbeing support services
- generous social budget and team away days
- agile and home working policies

To apply, please send a copy of your CV to recruitment@fiscalengineers.com.