

Job Placement title Administrator

Company name LifePlanning Solutions

Job Placement summary (Outline of the job description including key responsibilities and detail of the skills the young person will develop. Please provide as much detail as possible Please do not use bullet points)

As a firm we will ensure that staff giving information about investment products, investment services or ancillary services that are available through the firm to have the necessary knowledge and competence to understand the key characteristics, risk and features of investment products available through the firm, including any general tax implications and costs to be incurred by the client in the context of transactions. The particular care that should be taken when giving information with respect to products characterised by higher levels of complexity. An understanding of the total amount of costs and charges to be incurred by the client in the context of transactions in an investment product, or investment services or ancillary services. An understanding of the characteristics and scope of investment services or ancillary services. An understanding of the difference between past performance and future performance scenarios as well as the limits of predictive forecasting. An understanding of the issues relating to market abuse and anti-money laundering. How to assess data relevant to the investment products on which they provide information to clients such as Key Investor Information Documents, prospectuses, financial statements, or financial data. To enable them to have a basic knowledge of valuation principles for the type of investment products in relation to which the information is provided. To be able to discuss with clients the different types of Investment & ISA Accounts and the relevant limits, to be able to discuss ongoing service and produce and provide valuations. To be able to understand what a conflict of Interest (COI) is, how a COI may arise and how to manage it. To understand the company gift and inducement policy rules. To keep up to date with changes in company policies and procedures. To recognise the difference between information and advice. To complete the activities as shown in the LifePlanning Solutions Training & Competence (T & C) plan (Where applicable). To undertake in the staff training and firm specific assessments required under the T & C plan (Where applicable). To maintain knowledge and competence in the firm's internal procedures as highlighted in the T & C plan. Ho to maintain the photocopier and order printing supplies and stationery. To be able to maintain a good supply of LPS standard forms for inclusion in postal correspondence and meeting packs. To understand the important aspects of provider communications and correspondence which nclude issuing and chasing of Letters of authority (LoA's). To be able to perform administrative Duties, including telephone answering, e-mail management, task management on Intelligent Office and Outlook software, post duties, scanning and shredding.To be able to record client Information on Intelligent Office software and how to perform meeting preparation tasks including client valuations and appreciate annual review questionnaire responses. How to perform housekeeping duties including moving old files onto the new format and tidying ongoing files. Enable the employee to perform any other duties deemed appropriate by senior management.

Essential skills, experience and qualifications (please do not use bullet points)

Have attention to detail. An ability to interpret data and analyse where procedures can be improved. A good standard of written & verbal communication. An ability to empathise and build relationships with our clients, staff and strategic partners. Possess ability to work using own initiative. Ideally have a can do attitude to seek solutions. Can manage own time, workload meeting contractual obligations with good computer knowledge and skills. Must be comfortable with Microsoft word and Excel. Ideally administration experience in an office or small company.

Job category (DWP use only)

Number of hours per week 25

**Working pattern and
contracted hours** (including
any shift patterns)

Hourly rate of pay NMW