Client Services Administrator Apprentice

We are seeking a Client Services Administrator to join our team. This is a full-time permanent opportunity, working within an experienced team delivering administrative support.

We are looking for someone who demonstrates an uncompromising dedication to getting the job done, acts with integrity and is guided by what is right rather than what is easy. The ideal candidate is a proactive team player, encouraging colleagues and contributing to a collaborative and solution-focussed environment. A growth mindset and passion for continuous improvement are essential. This position requires impeccable attention to detail, a high degree of professionalism, and the ability to thrive in a fast-paced, client-centric environment.

The successful candidate will play a key role in supporting financial advisers and paraplanners in delivering high-quality financial planning and investment advice to clients. This position requires excellent organisational skills, accuracy, a positive attitude and a passion to deliver an outstanding service to our clients.

Job Description

Job Title: Client Services Administrator Apprentice

Responsible to: Operations Manager

Responsible for: Completion of business tasks and business processing for advisers. Ensuring both advisers and clients are prepared for meetings in advance and that all client queries and tasks are completed in a timely fashion and to a high standard.

Definitions: SJP – St. James's Place, FCA – Financial Conduct Authority

Purpose: To ensure that client appointments are managed properly, and all necessary pre and post meeting actions are completed to the highest standard. To prepare advisers for their meetings with the client and to always represent Abacus Wealth Services positively.

Duties: The day-to-day duties and responsibilities of the Client Services Administrator include (not limited to):

- Making appointments for clients and calling them in advance to confirm, sending out any relevant pre-meeting information

- Answering and logging all incoming client calls appropriately onto Salesforce, passing on messages and ensuring that any updates to client contact information are captured on Salesforce and Abacus systems
- To prepare new and existing client meeting packs, generating wealth account reports, investor returns, Abacus valuation documents, and any other necessary information for the adviser in advance of the meetings
- Create and maintain client records on Salesforce to ensure that GDPR, FCA and SJP protocols are adhered to
- Generate correspondence to clients, including post review letters
- Liaising with external providers and companies by way of letter, telephone, and email to chase information requests
- Processing fund switches, rebalances and client withdrawals, along with any other post meeting actions
- Prepare business submission documents, for onward allocation to the Paraplanning team
- Liaising with the paraplanning team to ensure client presentations are obtained ahead of meetings and escalate where necessary
- Managing own and/or adviser’s mailbox in a timely and professional manner
- Giving clients a professional welcome from our reception desk for meetings held onsite
- Prioritising and managing own workload
- Obtaining and maintaining a good knowledge of products offered
- Managing own learning and development, attending relevant training sessions where needed
- Provide cover for other team members upon request as per the business need
- To uphold the standards of the client service charter
- Participation in team meetings

Skills and Experience Required

Essential

- Excellent communication skills—both written and verbal

- High attention to detail and accuracy in all work
- Ability to prioritise workloads and meet deadlines under pressure
- Proficient in Microsoft Office (Word, Excel, Outlook) and CRM systems
- A team player with a proactive and solution-focussed attitude
- Excellent customer service skills

Desirable

- Experience of working within a high-pressured environment
- A keen interest in finance, pensions, investments, and protection products.

Benefit

- Private Health Care after successful completion of probation period
- Private Medical Insurance cash plan covering additional areas including dental/opticians
- 25 Days holiday (plus bank holidays)
- A great team culture
- Opportunities for progression
- An early finish on Friday
- Team socials

Start Date: As soon as possible

Contract Type: Full-time, fixed-term

Probation Period: 6 months

Work Location: In person - Clive Farm Buildings, Clive Road, Pattingham, Wolverhampton, WV6 7EN