



JOB TITLE: DATA ADMINISTRATOR

REPORTS TO: VP - ADVISER TECHNOLOGY

Kingswood Holdings Limited (trading as Kingswood) is an AIM-listed integrated wealth management group, with more than 7,000 active clients and c. £2.5 billion of Assets under Management. It has a growing network of offices across the UK as well as offices in New York and Johannesburg. Clients range from private individuals to some of the UK's largest universities. The Group's vision is to become a leading global provider of trusted wealth planning and investment management solutions to clients, underpinned by investment in people and innovation in technology to support our advisers and clients.

SUMMARY OF ROLE

In this role you will be mainly responsible for the completeness, accuracy and integrity of our data in our CRM & Portfolio system and the production of required management information. You will be also responsible for the management of small change and bug fixes within our JIRA tool.

RESPONSIBILITIES

- Liaising with the platform providers to ensure our data feeds are setup and operating correctly.
- Set up users and data feed accounts on our system.
- Running MI, data reports, and audits to ensure our data is being keyed right first time and train and monitor those who are not following our business process.
- Understand business requirements and build required MI packs and bespoke reports for management.
- Manage our issues and small change raised on our support tool JIRA, from initial creation to close.
- Provide excellent customer service to our financial advisers and users.
- Work closely with Adviser Technology on our product roadmap.

SKILLS AND EXPERIENCE

- XPLAN or IO, Avello experience is a must.
- Strong understanding of databases and CRM data management.
- Strong understanding of products and platforms.
- Experience in building management Information.
- Excellent communication skills, both written and verbal, with sound analytical and planning skills.
- Handle pressure and remain focused.
- Ability to demonstrate flexibility, prioritise workloads and work on your own initiative.
- Financial Services Industry and knowledge of software development cycle.