KINGSWOOD

JOB TITLE: Client Liaison – Wealth Planning Operations

REPORTS TO: Senior Client Liaison – Wealth Planning Operations

Kingswood Holdings Limited (trading as Kingswood) is an AIM-listed integrated wealth management group, with more than 7,000 active clients and c. £2 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

We are looking for an Associate (New Business Processing) to join our Client Liaison team in East Malling, Kent. This is a fantastic opportunity to have a real impact on the company's growth as we attract and hire the highest quality talent.

RESPONSIBILITIES

- Process new business, surrenders, fund switches, rebalances and deed of assignments as per the Summary of Actions using cases on Xplan
- Submit instructions online or send paperwork to product providers
- Add new plans and fee expectation onto Xplan
- Communicate with product providers or check online to track all applications
- Update task and case on Xplan with tracking notes
- Update plan details on Xplan once application is complete
- Liaise with Adviser and Associate with progress of application
- Send contract notes and policy documents to client

SKILLS AND EXPERIENCE

- Proven work experience in a previous Administration role within Financial Services
- Experience using XPLAN advantageous
- Excellent verbal and written communication skills
- Strong attention to detail
- Ability to build good working relationships across the Group
- Strong Microsoft Office skills
- Strong client service skills