



THORNTONS WEALTH

Vacancy: Business Support Administrator (F/T), Dundee

Thorntons Wealth are a successful and growing financial services organisation, headquartered in Dundee, specialising in the provision of financial planning advice to our clients across Scotland.

We are looking for a Business Support Administrator to join our team, providing administrative support to our established financial planning team.

Principal Responsibilities:

1. Production and distribution of annual client valuation reports through the collation of data from a variety of sources including finance platforms such as Nucleus and Standard Life
2. Update our financial back off systems such as Curo and client portals and other software applications used to update data held for clients
3. To update the CRM system to ensure all activity undertaken on the client accounts is reflected.
4. Respond to requests from the Financial Planners for information and produce reports accurately and in a timely fashion as required.
5. Provide phone cover where necessary to handle client and provider queries through to resolution
6. Manage and plan own workload and work within required deadlines.
7. Build and maintain good working relationships with colleagues and management

Secondary Responsibilities:

8. To process new business accurately and to the agreed procedures for the Financial Planning team.
9. To respond to enquiries from financial planners in a timely and accurate fashion ensuring we adhere to our service commitments.
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11. To respond to enquiries from financial planners in a timely and accurate fashion ensuring we adhere to our service commitments.
12. To develop a working knowledge of regulatory matters such as, but not limited to, Money Laundering, Treating Customers Fairly and Data Protection.
13. To adhere to those regulatory requirements and report in a timely fashion where this is not undertaken
14. To produce Letters of Authority for change of agency and follow these up as required.

Essential Criteria

- Meticulous attention to detail and ability to adhere to procedures
- Strong administration skills and proficiency in MS Office
- Excellent communications skills
- Team Player

We are a small but well-formed team with a great working culture where we are happy to support career development for the right individual.

If you think you meet the criteria, we'd love to hear from you. Salary is dependent on level of experience and relevant qualifications. Please send your CV to HUDSON@THORNTONS-INVESTMENTS.CO.UK
Closing Date: Friday 21st March 2025.