



Who We Are

Salisbury House Wealth has been servicing clients for almost 40 years, enriching lives, building security and providing reassurance beyond numbers. Our niche is engaging clients with their money, deeply understanding their needs, educating them about financial matters and partnering with them to deliver tailored solutions.

At the core of our business are our values:

- Nurturing Relationships - grounded in trust, transparency and collaboration with clients and colleagues.
- Navigating Futures - guiding clients through complex financial landscapes with clarity and expertise.
- Client-Centred Excellence - placing our clients' distinct requirements at the forefront, shaping their futures with personalised advice and outstanding service.
- Thriving Together - we're dedicated to our serious pursuit of excellence, making each step an enjoyable journey for our team and clients alike, reminding ourselves that our true impact is measured by the value we bring.

The Role

Our Client Support Team is fundamental to the success of our business, as the first point of contact for clients and providers alike. This involves providing administrative support of the highest standard and so that regulatory requirements are met from start to finish of the client journey.

As Client Support you will report to the Client Support Manager and constantly be looking to reduce business risk, increase efficiency and improve client outcomes, largely leveraged by the effective use of technology, adherence to company processes and outstanding customer service.

Duties & Responsibilities

- Providing an efficient new business processing service, completing research, trades/fund switches, and liaising with product providers, to ensure that new business is set up and processed correctly
- Providing administration support in relation to valuations, transfer of servicing and client reviews to allow advisers to conduct efficient and effective client meetings
- Providing an effective link between the client and the adviser, ensuring that both are kept up to date with all matters relating to their financial affairs
- Ensuring that all client information is stored on the relevant system, that it is updated accurately and in a timely manner, checking that all compliance requirements are met
- Providing post meeting administration support to advisers, ensuring that all work is completed within agreed timescales
- Ensuring that any complaints (formal or informal), breaches or losses are reported to the Commercial Director at the earliest possible opportunity to facilitate speedy resolution
- To undertake general administrative duties (e.g. scanning, filing, preparing letters, etc.) in order to ensure that deadlines are met, appropriate records are maintained and are accessible, and so as to comply with regulatory requirements
- To continually maintain and develop technical, product and industry knowledge in order to keep pace with developments and change, in order to be able to work effectively
- To support with process improvements and developments and business projects, to drive the company forwards



- To support with suitability, cashflow and client portal in line with set processes, templates and house views
- To undertake reasonable additional duties at the request of your Line Manager as may be required from time to time

Skills, Qualifications, Knowledge & Experience

- Essential
 - Excellent prioritisation and organisation, ensuring deadlines are adhered to and managing own workloads
 - Advanced data and IT skills, including data input, accuracy and navigation
 - Ability to build relationships with clients and advisers and ensure an effective relationship is maintained
- Desirable:
 - Experience of working for a Financial Adviser, with specific industry and product knowledge
 - Certificate in Financial Administration or equivalent
 - Experience of Intelliflo Office and/or The Openwork Partnership's ConcertHub system

Rewards

- Competitive salary
- Workplace pension with provider and funds under SHW main proposition via salary exchange (5% employer and 3% employee equivalent)
- 23 days holiday allowance, plus public holidays
- Holiday scheme allowing for purchase or sale of up to 5 days holiday entitlement per year
- Private medical scheme following successful completion of 6 months probation
- Hybrid working up to 1 day a week from home in addition to flexible working for appointments
- Funding and support for professional development
- Discounts on our services
- Referral scheme