Financial Planning Administrator

About the Company

Lync Wealth Management is a nationwide group of financial advice practices.

We combine the expertise of highly experienced financial advisers, with the regulatory support of our advice network Lyncombe Consultants.

At the core of our approach is a deep commitment to truly getting to know our clients – their aspirations, fears, and the unique circumstances that shape their journey.

We take the time to understand our clients' short-term needs and long-term dreams. Whether it's saving for a child's education, buying your dream home, starting a business, or planning for a comfortable retirement, we're here to guide them every step of the way.

Together, we collaboratively craft a personalised financial roadmap and regularly manage the route to ensure they remain on track to meet their goals.

Purpose

As a **Financial Planning Administrator**, you'll play a vital role in supporting our Paraplanners and Financial Advisers, helping to deliver a professional, compliant, and compassionate service to our clients. You'll be the bridge between advisers, providers, and clients, ensuring that every step of the advice journey is smooth, positive, and empowering. This role is ideal for someone who enjoys being organised, values meaningful client relationships, and wants to grow within a supportive and inclusive team.

Responsibilities

- Sending out application forms for clients to sign and return
- Communicating with product providers on behalf of clients
- Acting as a point of contact for clients when advisers are unavailable
- Updating databases with client correspondence and key information
- Creating and sending letters of authority
- Gathering data from providers to support product reviews
- Assisting Advisers and Paraplanners with administrative tasks
- Staying informed on compliance, economic, and legislative updates
- Scanning documents into client files
- Answering incoming calls and making outbound calls
- Welcoming clients to the office
- Performing other reasonable duties as required
- Complete any general tasks as requested by line manager and follow through to completion dealing with any queries that arise
- Keep knowledge of procedures up to date, by reading all updates & notifications issued
- Demonstrate the ability to identify and analyse problems, think critically & propose practical solutions
- Oversee client servicing & disengagement process in timely, compliant manner
- Possess strong organisation skills to manage multiple tasks and priorities effectively

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- While not directly interacting with customers, your actions should align with upholding the FCA's Consumer Duty principles, thereby contributing to fair and beneficial outcomes for our clients.

Knowledge

- Strong Microsoft office skills – Word, Excel & PowerPoint
- Good all round administrator
- Professional telephone manner
- Ability to work under pressure & manage priorities
- A good level of relevant experience Financial Services
- You may have relevant qualifications e.g. Financial Administration etc

Regulatory Obligations

Obligation	Comments
SMCR Category	Conduct rules only
Certification Role	N/A
Material Risk Taker	No

Version Control

Version	Date	Signed Off
V1		