

## Working With West Riding - Vacancies

Are you: -

- Honest?
- Hardworking?
- Competent?

- Qualified? And most of all, do you always have your clients' best interests at heart? We are recruiting independent financial advisors throughout the North of England. Longer-term we plan to expand throughout the UK and beyond.

As a company we are keen on compliance and have an exemplary record with zero complaints referred to the Financial Ombudsman Service. The best compliance however flows from the attitude of the advisor. If you work hard at keeping your knowledge up to date, if you are prepared to put yourself out for your clients and if you always try to get them the best deal, we would like to hear from you. We want colleagues who take a pride in their work and who want to earn their living by enhancing the financial well being of others. In return we offer a friendly and straightforward working environment with a fair remuneration package, mentoring and support to help you achieve your own goals in life. If this sounds like you, please get in touch.

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Our aim is that for the right people, there should be no better company to work with.

**Trainee Administration Assistant Vacancy** Hours: 35 HPW Holidays: 20 days plus statutory Bank Holidays etc.  
Salary: £16k+ dependant on qualifications and experience, plus bonus. Pension: We offer either auto-enrolment pension on standard statutory workplace pension terms where you and we pay into your pension, or our in-house alternative whereby we pay 6% of basic salary into a Stakeholder Pension for you and you don't need to pay in anything unless you wish. From April 2019 we will pay 9%. We have always paid more than the Real Living Wage, which is a lot more than the National Living Wage. We are a fair-pay employer. **Key Requirements** We intensively train all staff but it is essential that you: · Have a positive upbeat mental attitude. This is a can-do business. We cannot have negative people in the business; they drag everyone down. If you always have a reason why something can't be done, get a job with the government. · Are Self-motivated and driving · Have initiative · Have an enquiring mind good inter-personal skills to deal with clients, suppliers and other staff · Are a problem-solver and a work-doer, not a buck-passer! · Are flexible. We're a small firm and we all do whatever it takes to get the job done. **Tasks / Involvements:** 1. Maintaining the total confidentiality of the business and its clients. SECURITY OF CLIENT DATA AND PERSONAL INFORMATION IS OF THE HIGHEST PRIORITY. 2. Handling incoming telephone calls. (Deal with the enquiry yourself to the maximum degree possible and only refer on the enquiry to other staff at the point where it is beyond your ability to deal with it – no buck passing!) 3. Dealing effectively both face to face and remotely (phone, email etc.) with all clients and persons/organisations with whom we do business. 4. Maintaining our database and journal system, the key to all our administration and financial controls. These systems contain all client personal data, client contract records, the company's accounting mechanisms and payment systems. 5. Developing a complete working familiarity with the external platforms we use such as Fidelity FundsNetwork, Old Mutual Wealth, TrustNet, Iress, Assureweb and any/all other of our business systems so that you can prepare fast and accurate research, quotations and documentation. 6. Making up new client files with all appropriate documentation. 7. Ensuring that all client records and files are complete and compliant. 8. Keeping all records and filing up to date, both paper and electronic. 9. Being responsible for all accounts inputting and banking of cheques. 10. Dealing with all incoming and outgoing post. 11. Developing a good working familiarity with our computer systems and printer so that you can perform routine maintenance tasks. 12. Adhering to the diary/journal system and progress-chase all cases. 13. Preparing letters using the templates provided and other letters as necessary on your own initiative. 14. Maintaining all office supplies, forms, printer/copier toner etc. (It's your job to ensure we don't run out!) 15. Taking the post and doing 'office shopping'. 16. Contribute original thought to the business. We pay people to think and to have and use initiative. We don't think we know everything. If you think you've got a good idea about how we should be doing something better or whatever, don't be shy – tell us. **Appearance** Smart business attire. Personal jewellery is acceptable e.g. earrings but excessive facial piercings and visible tattoos are not. You must be confident, pleasant, polite and presentable. **Technical Skills** You need to have excellent maths and English. Specifically you need to be able to write grammatical letters and to be able to spell. We use the standard Microsoft Office package. You will use Microsoft Word and Excel on a daily basis. You will also need to learn to audio type as we do use Dictaphones in the business. **Career Development – Your Future** In terms of career development, how high you climb and how fast is down to you alone. To be an advisor you need to pass exams and that means studying in your own time, in lunch breaks and/or at home. We expect you to put the effort in. If you do, we'll reward it. It's worth it. As an advisor you should earn at least £30,000pa and your potential earnings are greater still, but it takes work and experience. Ultimately your career is all down to you. There are no glass ceilings here; everyone in the business can rise as far and as fast as his or her abilities can take them. If you are honest, hardworking, smart and determined, you can do it. **What We Don't Want - Total No-Nos!** · Normally we would not expect you to have your mobile phone switched on at work. Texting is a major timewaster. If you need to be surgically separated from your phone this is not the

job for you. · Negativity. This is a can-do firm. · Reasonable personal use of our phones where necessary is fine, we are reasonable people. However, you cannot spend ages in work time blathering to your mates about what you did at the weekend. · As explained above confidentiality is paramount. You cannot discuss clients' affairs with anyone outside the business. REPEAT &ndash; CONFIDENTIALITY IS PARAMOUNT. · Lateness, throwing sickies and general laziness / bad attitude is guaranteed to get you fired. This is a small firm and we really are all in it together. If we all do a good job we all earn a good living but one person can goof it up for everyone, so we don't tolerate anyone taking the proverbial. · Dishonesty of any kind. We handle clients' life savings. Every job in this office, no matter how junior, is a position of trust. Sound strict? Yep, but it's also a fun and friendly place to work with no 'gender pay gap'. All our staff are long-time employed here, so we must be doing something right. We don't micro-manage. No good manager wants to be a micro-manager and no sane person wants to be micro-managed. The reason we've identified all the do's and don'ts above is that we like our people to be as self-managing as possible. That was what always made us happiest when we worked for other people; having the task explained and being left to get on with it, with help on hand if needed. So that's the way we like to manage others. Training-wise, if you succeed here you can work just about anywhere in financial services because we cover pretty much everything. Though you'll be joining us as an administrator you'll have the opportunity to acquire internationally-recognised qualifications that will make you eminently employable. We've had some great success stories come out of our firm and we're still friends with them in their new careers elsewhere. We trained them up from scratch and they've become advisers and paraplanners in their own right. One day there's every possibility they'll work here again. We don't have a problem re-employing those who leave on good terms and want to broaden their horizons. Social-wise, we have a company year-end dinner every July, a Christmas bash in December and a summer barbecue at our place too. Like I said, it's fun! We look after our people; you just have to work to earn it. We asked our staff why they enjoy working here and these are the answers we got. This is them talking &ndash; not us - "You're respected - your views and opinions are actually valued." "It's a busy, friendly and professional working environment. You don't have time to get bored!" "There's none of the unnecessary red tape and hierarchical crap you get from working in large corporate firms." "There are great opportunities for career progression." "It's interesting and varied work - no two days are the same." "Most business comes from satisfied clients and from the friends and family they refer to us; so it makes for a very friendly working environment. Clients genuinely become friends." "Complete job satisfaction. I see us getting great results for the clients we look after and I feel great about it." "Competitive salaries and a generous pension scheme. And we REALLY love the bonus scheme which is completely fair and transparent." WWW.WRPFS.COM