

Sales Support Administrator

PK Group are currently recruiting to fill the position of a Sales Support Administrator with IFA practice experience including a very good working knowledge of Intelliflo Office software. The position is offered as a full-time role and will encompass the responsibilities laid out below.

The successful candidate will be able to “hit the ground running” with little product and software training required. The role will involve all IFA back office functions, including group schemes and Automatic Enrolment. Experience of Ascentric, FundsNetwork, ARC and Aviva platforms will be an advantage.

Desired Skills and Experience

- Processing new business from receipt of application to conclusion
- Using platforms for new business processing, switching, withdrawals etc.
- Processing authority letters and collating product information
- Producing Annual Review Reports using Intelliflo Office Portfolio Report
- Experience of administering Group Pension & Protection Schemes
- Software - Microsoft Office suite
- General administration including client address changes, invoice production
- Ability to work under pressure in an organised manner

About PK Group

PK Group is a fast-growing, London-based firm of accountants, financial advisors and wealth managers. We provide these services through our three offices based in Richmond, Woking and Sittingbourne.

As one of the leaders of the new generation of financial service companies, we are dedicated to using our financial experience and expertise to help grow and protect our clients' businesses, income and wealth.

With every client cared for by one of our advisers, we can ensure both a proactive and professional service. Each adviser is an expert in at least one financial discipline whilst also remaining knowledgeable in our other fields. This ensures that our clients have direct access to the expertise they require and easy access to our wide range of experts from accountants and tax advisors to pension specialists and corporate financiers.

PK Group offers a dynamic working environment with the support of a friendly team.

