SG WEALTH MANAGEMENT
Impartial, accountable and trusted.

Job Title:	CLIENT SERVICES SUPPORT		
Place of Work:	Norwich / Ipswich	**Function/Pod:**	Client Services / Business Support
Working Hours:	37.5 hrs Monday – Friday 08:30 – 17:00 (60 min Unpaid Lunch)	**Position Type:**	Full Time
Salary Level/Range:	Client Services Level	**Contract Type:**	Permanent
Reports To:	Head of Client Services	**Supervises:**	N/A

Job Purpose

The purpose of this role is to provide administrative support to the Head of Client Services, Client Services Supervisor, Financial Planner(s), and liaise with Paraplanners and Technical Support. To manage a case load of various administrative requirements, coordinating your workload with your line manager and supporting team members to ensure that the level of administrative support is maintained at all times, whilst ensuring the service our clients receive is exemplary.

To maintain client records, ensuring they are accurate and up to date. Build excellent working relationships with clients, prospects, introducers and platform providers whilst often being the first port of call for clients, particularly when the Financial Planner is not available.

Also, to ensure attendance and participation at business meetings (alongside other business services colleagues as and when required).

Job Description

Role and Responsibilities

Generic Responsibilities
- Ensure compliance with all standards and regulations in your work and consistently meet deadlines.
- Take ownership of your workload, prioritising tasks to stay on top of daily responsibilities.
- Maintain the highest level of client confidentiality and adhere to GDPR requirements.
- Participate in the continuous improvement of processes, helping us refine and implement better ways of working.

Client Services Responsibilities
- Provide day-to-day administrative support to Financial Planner(s), including setting up policies and Trusts, handling income/withdrawal changes, premiums, funds, and preparing meeting packs.
- Liaise with product providers and generate plan information as requested, proactively addressing client needs.
- Work closely with Paraplanners and Technical Support to ensure timely delivery of client reports.
- Act as a key point of contact for clients, handling complex and sensitive queries on behalf of the Financial Planner(s).
- Maintain accurate client records, ensuring all administrative tasks are properly diarised and actioned in Intelliflo Office (iO), with relevant correspondence logged.
- Respond to client queries promptly and clearly, providing excellent communication through all channels.

- Process business documentation, including setting up new policies, handling application forms, and drafting instruction letters.
- Manage your time and workload effectively to meet business needs.
- Prepare regular valuation reports in line with client propositions.
- Build strong relationships with platform providers, escalating issues to the Head of Client Services or Client Services Supervisor when necessary.
- Seek support from the Head of Client Services for any non-standard client or Financial Planner requests.

Additional Duties

- Perform ad hoc duties as required, in line with the needs of the team and as directed by your line manager.

Note: This is a summary of key responsibilities, and the role may involve other duties aligned with your skillset.

Skills and Experience Required

- Self-motivated and accountable, with a strong sense of commitment and a proven ability to work well within a team.
- Excellent communication skills—both written and verbal—with a high standard of spoken and written English.
- A team player who can also work independently without constant supervision.
- A good understanding of a Client Services environment, particularly in handling complex administrative tasks.
- Strong organisational and prioritisation skills, with the ability to manage time effectively and adapt to changing work demands.
- Previous experience in a similar role within a financial environment (preferred but not essential).
- Highly numerate with excellent problem-solving skills, maintaining a solutions-focused approach.
- Strong ability to foster positive relationships across teams and departments.
- Proficient in IT skills, particularly in Excel, Word, and PowerPoint.
- Experience using the Intelliflo Office (iO) system (an advantage but not required).

Qualifications

- GCSE English and Maths (or equivalent).
- Relevant Financial Services qualifications (advantageous but not essential).

Reviewed By:	Penny Ellis, HR Advisor	Date:	11/02/2026
Approved By:	Fran Kemp, Director of Business Services	Date:	09/10//2024
Issued to Role Holder:		Date:	