



JOB DESCRIPTION FOR ADVISORY ASSISTANT

JOB OVERVIEW

The Advisory Assistant provides administrative and operational support to financial advisors, overseeing client instructions, documentation, follow-ups, and servicing activities with accuracy, efficiency, and professionalism. The role is key to delivering a seamless client experience, while maintaining complete, dependable, audit ready client records.

Skills and attributes required:

- Accuracy and diligence
- Analytical
- Organised
- Problem solving
- Time management
- Ability to work independently
- Ability to work under pressure and to deadlines
- Collaborator
- Professional communication skills
- Honesty and integrity

Systems experience on the below would be advantageous:

- Microsoft Outlook, Teams, SharePoint, Word, and Excel
- Electronic signature platforms
- Product provider online platforms
- Financial services or client relationship management systems
- Astute, nCino or similar systems would be beneficial

Qualifications and experience:

- Previous experience in financial planning, investments, insurance, or a related financial services environment would be beneficial.
- Experience supporting financial advisors and managing client instructions would be advantageous.
- A relevant administrative, financial services or business qualification would be advantageous.
- A working understanding of financial services administration and compliance requirements would be beneficial.
- Strong computer literacy is required.

RESPONSIBILITIES AND DUTIES

Client Administration and Service Support

Serves as the main coordination point between clients, advisors, and service providers, ensuring all requests and communication to ensure a seamless professional service.

Client Onboarding, New Business and Servicing

Supports client onboarding, new business, and ongoing servicing by accurately processing instructions and documentation from start to finish.

Record Management, Compliance and Accuracy

Maintains accurate, compliant, and audit-ready client records while protecting confidentiality and following internal standards.

Systems, Workflow and Teamwork

Supports efficient service delivery through effective workflow management, consistent system use, teamwork, and continuous improvement.

Greater Office Contribution

Contributes positively to the broader success of the business by demonstrating the company's values, maintaining excellence, professionalism, and compliance, supporting colleagues where appropriate, and consistently delivering accurate, quality work that strengthens client service and team performance.