

Adviser Platform Support

About P1

As a leading discretionary investment manager and platform operator, P1 Investment Services partners with industry professionals to leverage innovative technology, bypassing the constraints that often hinder traditional investment firms. Our offerings include a comprehensive investment platform, model portfolios accessible via third-party platforms and tailor-made investment services.

At P1, our priorities are to deliver exceptional client service, pioneer innovative solutions, and minimise costs for our clients.

Job Role

As part of the Adviser Platform Support team, you will serve as the primary point of contact for financial advisers using the P1 Platform. You will assist in the general day to day running of the platform, which includes; smooth onboarding, facilitating pension and investment transfers, assisting with account creation, and providing solutions to general support queries. This role requires an individual with a keen attention to detail, ability to handle a varying workload throughout the day and a passion for delivering exemplary customer service.

Key Responsibilities

- Platform support for Financial Advisers;
 - Provide first-line support to financial advisers using the investment platform.
 - Troubleshoot and resolve any platform-related issues in a timely and efficient manner.
 - Organise and lead training sessions for new advisers to familiarise and keep them up them with the platform.
- Pension and Investment Transfer Management;
 - Coordinate and manage the transfer of pensions and investments to our platform.
 - Liaise with external providers and ensure the seamless transition of assets.
 - Monitor transfer statuses and provide timely updates to advisers.
- Account Creation and Maintenance;
 - Assist financial advisers in the creation of new client accounts.
 - Ensure all necessary documentation and information is collected and stored securely.
 - Perform routine account maintenance and reviews as needed.
- General Support;
 - Respond to a variety of support queries, ranging from platform functionalities to financial instrument details.
 - Work closely with the IT department to address any technical issues.
 - Document and escalate complex issues to the appropriate teams or departments.
- Continuous Improvement;
 - Gather feedback from financial advisers to identify potential areas of improvement for the platform.
 - Stay updated with industry trends and best practices to suggest platform enhancements.
 - Participate in regular team meetings to discuss and implement operational improvements.

Skills & Knowledge

- Excellent knowledge of MS Office.
- Effective communication skills.
- Ability to prioritise workload.
- Clear understanding of the need to maintain confidentiality in all areas of work.
- Strong numeracy and literacy skills.
- Experience of previous administration work is not essential.

Benefits

- Support towards professional growth and development.
- Flexible working options.
- Competitive remuneration package, including basic salary dependent on previous experience and bonuses.
- Workplace pension where you contribute 4% and the company contributes 4% which rises to 6% after 5 years.
- Group Life Insurance and Income Protection.
- The standard holiday is 24 days increasing by a day after each year of service up to 32 days plus bank holidays.

Apply

If you would like to become a member of the team, please email your CV and a covering letter to craigwhite@p1-im.co.uk. Please include your full contact details so we can contact you.