**PRIVATE CLIENT ADMINISTRATOR**

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| **Job Title** | Private Client Administrator |
| **Jobholder** | New post |
| **Salary Scale**  | £16,380 - £18,000 per annum |
| **Working Pattern** | 9am – 5pm, Monday to Friday with one hour for lunch |
| **Reports To** | Senior Trust Accounts Manager |
| **Job Purpose** | This post is a learning and development opportunity. We are looking for an administrator who is financially astute, pro-active, with excellent interpersonal skills to train over the longer term to manage a portfolio of private clients, trusts and charitable trusts.  |
| **Management Responsibility for** | None  |

**Main Duties and Responsibilities**

* Providing administrative support to the Private Client and Accounts Team in processing inward and outward payments, arranging tax payments to HMRC on behalf of clients and assisting with the recovery of clients’ legal fees raised by the firm.
* Assisting with the day-to-day administration involved in the management of trusts and charitable trusts, including preparation for regular trustees’ meetings, production of working papers, and record keeping.
* Managing a dedicated case load of personal and trust account clients (training will be provided)
* Preparing regular cash accounts and statements of account for personal clients (training will be provided).
* Opening, closing and maintaining client files.
* Responding as the first point of contact to enquires, both internal and external.

**Skills, Knowledge and Experience**

* Excellent interpersonal skills, both written and oral
* Excellent numeracy skills
* High level of accuracy and attention to detail
* Proficient in the use of Microsoft Office applications, in particular Excel and Word
* A team player with a ‘can do’ attitude and common-sense approach
* Good organisational skills and the ability to prioritise tasks