

CLIENT SERVICES MANAGER

Due to the growth of the company, we have an opportunity for a stellar Client Services Manager to join the Modulus Financial Planning Team! This will initially be a part time position leading onto a full-time role but for the right person it could be either full or part time. The role can be a mix of office based and home working or fully office based (if so desired).

The successful applicant will be well organised, adaptable, and able to work as part of a core team to help drive and shape the success of the business. Modulus Financial Planning aims to provide a first-class service to all clients, whilst having a bit of fun doing so. The person who comes in should be ready to muck in, enjoy the craic and possibly like scones (tray bakes also work)!

Our Client Services Manager will be the first point of contact for everyone so we are looking for someone professional, with great communication skills, an understanding of the reasons people might need our help and to be able to deliver on these queries where possible. The role will require someone with experience in financial services administration (e.g., 3 – 4 years + using CRM systems, investment platforms and financial planning software) and general office duties. We need someone who will add to the team to help enhance the overall service proposition that our clients both need and expect. The successful applicant won't be afraid to challenge current processes if they see a better way of doing things and who has the confidence to help lead the business into its next phase of growth. We are seeking someone who is passionate and wants to be part of something different, something special and unique and who is ready to come on that journey with us.

Salary: £18,000 – £22,000 (depending on skills and experience)

Company pension: 8% non-contributory (that means we pay the full amount)

Holidays: 32 days per annum (including statutory days)

Hours: 9am to 5pm (with an hour for lunch).

Application deadline: 26/11/2021

Job Types: Permanent – part time / full time

Development: We want the right person to grow within the role and are committed to helping them develop the skills and qualifications necessary to do so

If you think that working with us here at Modulus Financial Planning is for you then please e-mail your CV and a covering letter to hello@modulusfp.com to be considered for the role of Client Services Manager.