

Training Provider: Carlisle College

Employer: Truly Independent Ltd

About Truly Independent

Founded in 2010, Truly Independent Ltd is a firm of experienced Independent Financial Advisers who provide a traditional method of face to face financial planning.

We are strong believers that everyone should have access to financial advice that is not governed or influenced by others. We have an extensive level of knowledge, experience and expertise, and have the freedom to research the whole market to get the best deal for our clients. We work in partnership with our clients to meet financial aspirations and recognize the importance of providing long-term on-going assistance and guidance.

The Role:

Fantastic opportunity to commence a career in a financial services business. Encouraged by our experienced team you will be supported and learn all aspects of Business Administration. Working towards the Business Administrator qualification, this role is the perfect opportunity for those who have the drive and desire to succeed in assisting with the day to day running of the office, supporting business growth & development.

Duties to include, but not limited to:

- Covers reception upon occasion
- Data handling
- Providing administrative support for other departments
- Organising events Business communications
- Managing and distributing all incoming and outgoing post and couriers
- Responsible for completion of administrative tasks in the relevant area, such as scanning, electronic filing and diary bookings
- Updating data records on internal and external software
- Using the in-house computerised system to support advisers
- Interacts with clients, visitors.
- Arranges meetings by reserving rooms and managing refreshments
- Types correspondence, meeting notes, and forms among other documents
- Maintains accurate records and enters data
- Conducts research and compiles data
- Signs for delivered packages and distributes them to the appropriate recipient
- Interacts with directors when necessary
- Assists in setting up new client accounts
- Maintains financial database records
- Maintains stock of supplies by anticipating work requirements, ordering supplies, and distributing supplies where necessary
- Engages in educational opportunities as needed

Skills Required:

- Punctuality
- Comfortable with technology
- Flexible and able to prioritise a changing to do list
- Detail oriented and accurate
- Articulate and a good communicator
- Good with English (verbally and written)

Personal Qualities:

- An efficient and professional attitude
- An honest and reliable character
- Super organised
- Friendly and helpful
- Trustworthy and reliable
- Self-motivated
- Able to work in a team

Qualifications Required:

- GCSE Maths and English at Grade C, 9 to 4, or Functional Skills Level 2

GCSE IT at Grade C (preferred but not essential)

Future Prospects:

Truly Independent is a national firm that encourages growth and progression.

Working Week:

Your normal hours of work are 35.25 hours per week, to be worked during the hours of 8.45am to 5.00pm on Monday to Thursday and 8.45am to 4pm on Friday.

One of these days will be in Carlisle College during term time.

Job Types: Full-time, Apprenticeship

Salary: £4.15 per hour

Schedule:

Monday to Friday

Education:

GCSE or equivalent (Preferred)

Work remotely:

No

