

Corporate Services Coordinator – Cheltenham

Do you have experience of employee benefits and auto enrolment? Are you currently studying towards your Diploma in Financial Planning? Are you looking for an employer that will support further study and offers career development alongside an excellent benefits package? If so, please keep reading!

Attivo Group has an exciting Corporate Services Coordinator vacancy based in Cheltenham.

This is a unique opportunity to become a member of the Senior Technical Support team working specifically with Corporate Services and developing your career utilising the excellent study support that we provide. The purpose of the Senior Technical Support team is to provide support to the Financial Planners to ensure the smooth processing of client requirements.

We provide our advice and service through Attivo Financial Planning, one of the very few genuinely Independent, Chartered, Pension Transfer Specialist, financial planning firms in the UK.

We aim to deliver the most professional, technically competent, independent advice and service to our clients. We want to be seen as a leader in the financial planning sector, to help change the standing of financial planning to be recognised as a genuine profession and to ensure we, and the profession, contribute positively to society and the economy.

Main responsibilities

- to undertake the timely administration of all aspects of auto-enrolment and group protection for our corporate client base to ensure that schemes are set up in a timely manner and to maximise client support and satisfaction throughout the process
- ensure all aspects of auto-enrolment and group protection from new business to annual governance stage are processed accurately, efficiently and within the regulatory timeframes
- maintain data on Curo accurately and in a timely manner
- act as point of contact and expertise for all group protection and auto enrolment for internal and external stakeholders
- liaise with product providers to set up the plans
- administer the monthly pension contribution upload process accurately and within the prescribed timescales
- apply auto enrolment and group protection knowledge to client and adviser queries and situations as they arise.

Qualifications, skills and experience

- experience in the financial services industry, working for an Independent Financial Adviser
- experience of working in an FCA regulated environment
- minimum 5 GCSEs graded A-B, including Maths and English
- CII exams are desirable
- educated to degree level would be an advantage
- excellent understanding of auto enrolment and group protection
- good understanding of compliance processes and issues
- excellent interpersonal, listening, numerical and IT skills
- strong analytical and research skills
- good organisational, time management skills and effective caseload management
- ability to work on own initiative, sometimes for long periods of time
- professional, ethical and discreet
- ability to build and maintain ongoing client relationships

- ability to work well under pressure while maintaining excellent attention to detail
- a desire and drive to obtain industry qualifications and embrace career progression within the company.

Salary and benefits

£20,000 - £28,000 depending on experience and qualifications.

Attivo Group also offers:

- excellent company benefits package including a non-contributory Pension Scheme, Private Medical Insurance, Income Protection, Critical Illness and Death in Service
- generous holiday allowance
- corporate gym membership
- parking allowance for employees who live over 1.5 miles away from the office (Cheltenham only)
- regular company social events
- charity days
- excellent culture, promoting employee wellbeing and engagement.

How to apply

For further information, please get in touch. To apply for this role, please email your CV along with a covering email or letter to careers@attivogroup.co.uk.

Privacy Policy

If we have received your details in response to a recruitment initiative, we will store the personal information that either you, your recruitment agent or another third party has provided us with. We process that information because it is in our legitimate interests to do so in order for us to be able to make an informed decision about whether to interview you and, ultimately, recruit you.

We believe that you would reasonably expect us to process your personal information in this way and that such processing does not have an impact on you in a way that would make this processing unfair. Where your personal information is kept as part of a file relating to prospective employees of Attivo Group, we will retain that information and any information relating to that matter. This is so that we can review the file if any complaints or issues arise after the recruitment process. The length of time that we keep prospective employee files is usually 3 months after conclusion of the relevant recruitment process.

Unless you request us not to do so, we may also contact those individuals who are referred to in any information you provide us with, for example referees. This contact may be made by telephone, e-mail or post. We will only do this if we have your express permission to contact them in this way.

Where you have provided us with personal information about a referee or a previous employer, it is your responsibility to inform that person that you have provided us with their details and that we will be processing it in connection with your employment application. You should also give them our contact details (below) should they wish to discuss this with us. Click [here](#) to view our full privacy policy for prospective employees.

Agencies

****We are unable to offer this position to recruitment agencies so we respectfully ask that agencies do not contact us in regard to posts advertised on this site****

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