



## **Finance/Admin Assistant**

### **About Progressive Financial Planning**

At Progressive Financial Planning, our aim is to provide all our clients with quality independent financial advice and to give them the freedom to choose the level of service and advice they require. We believe strongly in the virtues of quality personal service and customer choice.

### **About You**

You'll be passionate about delivering a quality customer service experience. Ideally, you'll have a background in finance/bookkeeping and administration and will be able to learn new systems and packages easily. You'll be super numerate, computer literate and highly organised with excellent time management skills and the ability to manage your own workload, prioritise tasks and follow prescribed processes.

### **Your Role**

Based in our Maidenhead office you will be working as part of a small team to provide administrative support for 2 financial advisors.

### **Your Key Responsibilities:**

- Working closely with the office manager to support her with the accounts function and general administrative duties.
- Processing sales and purchase invoices, including updating our accounting software.
- Processing fees/commission data including updating various financial spreadsheets.
- Using and updating back-office systems including our client database.
- Liaising with financial providers via phone, email and online.
- Processing client applications.

### **Essential Skills:**

- Advanced MS Excel skills (creating spreadsheets and using financial functions)
- Must have very high level of attention to detail, with an ability to spot numerical errors.
- Strong IT skills with an ability to learn new software.
- Strong organisational skills.
- No experience in accounting software is required, however a knowledge of Sage 50 accounts could be beneficial.
- No experience in the financial services sector is required, although this could be beneficial.

### **What's in it for you?**

- We are offering 25 hours per week over 4/5 days on a permanent contract.
- We provide 25 days per year paid holidays plus Bank Holidays pro rata.
- We'll invest in you with a competitive salary, circa £24,000 to £27,000 (full time equivalent) depending on your skills and experience.
- To help plan your future you can join our Pension Scheme.
- We are based on the Stubbings Estate in Maidenhead which offers excellent amenities, free parking and a beautiful working environment.
- We are a welcoming and friendly team of people to work with.

Please apply in writing with cv to [cvs@progressive-fp.co.uk](mailto:cvs@progressive-fp.co.uk)

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