

Job Description – Client Associate

Why work for Monenti Partners

Monenti Partners was established with a clear mission. We aim and aspire to set the benchmark for the quality of financial planning we provide our clients, and the positive outcomes we deliver for them as a result.

Our mission is to take our clients from Financial Uncertainty to Financial Freedom.

Our team members tell us a key element to our success in achieving our mission is our approach to collaboration both internally and with our clients. We put our clients Lifestyle Objectives at the centre of all of the work we do and do not simply transact the financial advice that a client requires.

We are a growing team with aspirational objectives, providing exciting career progression. We are looking for a Client Associate who shares our values and wants to continue on our process orientated approach to improving both our clients and our own individual outcomes. We see the Client Associate role as a key function to the success of a clients outcome, be that the link between the advice provided to a client and its end implementation, or how clients are communicated with on an ongoing basis.

Watch the below videos to find out more.

[What our Team Say](#)

[Monenti Partners - An Introduction](#)

[Our Process](#)

A Day in the Life of an Monenti Partners Client Associate

- **Tailored Financial Planning Service (TFPS)** – Be the centre point of the TFPS service.
- **Planning Meetings** -
 - **Pre Meeting** – Arrange meetings, collect and prepare documentation for meetings (Client information, Agenda's, Investment Report's and Risk Review's).
 - **Post Meeting** – Utilise our streamlined reporting tool to confirm details to clients.
- **Technology** – The TFPS is centred around the effective use of technology to streamline our processes.
- **Compliance** – In all aspects work within our compliance structures to better client outcomes.
- **Communicate** – Liaise with clients as part of the implementation of their financial plans. Answering phone calls and managing client correspondence.
- **Record** – Collate, update and manage client data. Including managing CRM data and registers.



- **Utilise and Improve Processes** – Play a key role in both utilising and improving our processes and workflows.
- **Shadowing** – Shadowing the Directors of the business in planning meetings.
- **Growth** – This role could grow into either a paraplanning or financial planner role.

About you:

You will need:

- IFA/financial services background, with core administration functions and client contact exposure.
- **Experience:** Client contact arranging meetings and dealing with queries, template suitability letters, creating valuations and meeting preparation, liaising with product providers, using technology specifically Dynamic Planner Elements.
- **Exams:** May have taken some level 4 exams.
- Outstanding attention to detail.
- Able to utilise and improve processes.
- Make effective individual decisions within a team environment.

Technology Stack (Knowledge Preferred)

- Dynamic Planner
- Intelligent Office
- Voyant
- Office 365

Main Product Providers & Platforms

- Fidelity Adviser Solutions
- Quilter Investment Platform
- Novia
- Quilter International

Salary & Benefits:

Salary: Competitive

Bonus: Discretionary

Pension: Yes

Private Medical Insurance: Yes

Life Cover: Yes

Other Benefits: Exam Support, Cycle to Work Scheme

Hours: Permanent, full time, flexible working

MP Values

- Integrity
- Diligence
- Commitment
- Energy
- Curiosity