

Administrator – Financial Planning

£26,200 to £30,900 | Full time | Hybrid (Bristol office Mondays)

Ovation Finance helps its clients accumulate life, not just wealth.

We're a values driven, **B Corp certified**, employee-owned financial planning firm that believes in doing the right thing, always. Our guiding principle is simple: *would you advise your mum to do that?* If the answer is no, we don't do it.

We're looking for an Administrator to join our team and play a key role supporting advisers, keeping everything running smoothly, and helping deliver a great experience for our clients.

Why join Ovation Finance?

We're a warm, collaborative team that takes pride in what we do. There's no hierarchy for the sake of it, and no egos. People are trusted to get on with their work, supported when they need it, and recognised when they do well.

You'll be joining a business where:

- You're trusted and given real ownership of your role
- Your development is actively supported, including exams and training
- Flexibility is part of how we work, not a perk
- You're part of an employee-owned business, sharing in its success
- We're a **certified B Corp**, committed to balancing profit with purpose

The role

This is a key operational role within the business, supporting advisers to ensure client work is processed efficiently, accurately, and to a high standard.

What you'll be doing

- Processing new business from application through to completion
- Gathering and checking policy information and documentation
- Preparing forms and illustrations
- Supporting adviser diary management and meeting preparation
- Keeping client records and systems fully up to date
- Working closely with advisers and paraplanners to progress cases
- Supporting the Practice Manager with ongoing projects

What success looks like

- Work is processed accurately and efficiently first time
- Advisers are well organised and supported
- Clients experience a smooth and professional service
- Systems and records are consistently up to date

Working pattern

- Full time position
- Hybrid working
- Mondays in our Bristol office (team day)
- The rest of the week can be home based or office based

We provide full home working equipment and support flexible working where possible.

What you'll get

- Salary of £26,200 to £30,900
 - Employee ownership with annual profit share
 - 7% non-contributory pension
 - 25 days holiday plus bank holidays plus long service award
 - Death in service (6x salary)
 - Health cash plan
 - Full home working setup
 - Enhanced maternity and paternity pay
 - Ongoing training and exam support
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What we're looking for



Essential

- Experience working in financial services or financial planning
- Strong attention to detail and accuracy
- Excellent organisation skills, including diary management
- Strong written and verbal communication
- A proactive and collaborative approach

Desirable

- Experience working in a financial advice firm
- Experience submitting new business (e.g. Nucleus, M&G Wealth, Transact)
- Experience using IRESS Xplan

Our values

We look for people who share our approach:

- Integrity in everything we do
- A belief that there's more to life than money
- Only ever recommending what you'd be happy for your mum to do

Equality and diversity

Ovation Finance is committed to building a diverse and inclusive workplace. We welcome applications from all backgrounds and aim to create an environment where everyone feels valued and supported.