Job Title: Assistant to Head of Wealth Planning and Head of Proposition Management (12 Month Fixed-Term Contract)

Department:	Wealth Planning
Location:	Mayfair
Salary	Competitive salary plus a generous benefits package
Contractual Hours	Full-Time Equivalent (37.5 hours per week)
Job Summary	To provide holistic, high-quality administrative support to the Head of Wealth Planning, and the Head of Proposition Management. The role is responsible for managing schedules, preparing documentation, coordinating meetings, maintaining accurate records, and supporting routine financial administration tasks. By delivering reliable, detail-driven support, the Assistant enables the department heads to operate effectively and maintain focus on strategic and client-facing priorities.
Key accountabilities	To support the department heads in the completion of their business: • Deal with all forms of client communications including, where necessary, arranging client meetings. • Obtain and prepare paperwork required for client meetings and business submission. • Being involved in client meetings – preparation, attendance, and output (meeting notes and follow-up, etc.), where appropriate. • Updating client records and production of fact find documents. • Production of simplified Voyant plans and client annual review reports within agreed timescales. • Handling and screening of all phone calls from clients and third parties; taking messages and feeding back. • Supporting and managing email traffic for department heads; responding to client emails, where appropriate. • Arranging client meetings and coordinating with all stakeholders to ensure times/dates suit all parties. • Being the Secretary for the Proposition Forum and Board Governance matters, including minute taking and building board pack agendas. • Managing client financial processing, including preparing and arranging payments, journals, and other financial transactions

	on behalf of clients, ensuring accuracy, compliance, and timely execution. • Minute taking and distribution of meeting notes for team meetings, including any action points. To provide professional and proactive administrative support, including: • Routine administrative tasks such as filing, photocopying, collating information, composing letters and emails. • Team administration and compliance regarding client service issues. • Liaise with 'product providers' to obtain all necessary information on clients' existing arrangements and implementation of new business. • Open wealth planning post and action immediately. • Filing – maintain up-to-date and accurate client records electronically and, if appropriate, hard copy. • Obtain product research, information and new business illustrations. • Liaise with providers regarding commission and fee payments. • Input of Data obtained from clients and providers into the relevant system (CRM, Intelliflo, Voyant etc).
Competencies/skill set	• Getting Things Done • Communication & Sharing Knowledge • Customer Service • Effectiveness & Adaptability • Team Working • Organisation
Qualifications/experience required	**Essential** • Previous administration experience is essential • Good working knowledge of Microsoft Office applications. • Experience in managing day-to-day tasks for themselves and others. • Excellent planning and organisational skills • Ability to prioritise under pressure **Desirable** • Previous experience within a financial services role is desirable

To apply, please email your CV and cover letter to recruitment@killik.com.

We are committed to ensuring a fair and inclusive process. If you require any reasonable adjustments under the Equality Act 2010 (for example, accessibility support or alternative formats), please let us know in advance so we can make the necessary arrangements. Your personal information will be handled in accordance with the UK GDPR and our privacy policy.

Recruitment Process

At Killik & Co, we are committed to conducting a fair, consistent, and transparent recruitment process. While the structure may vary depending on the position, candidates can typically expect the following stages:

1. **CV Review** – All applications are anonymised, assessed against the essential and desirable criteria outlined in the role profile.

2. **First Interview** – An initial conversation designed to explore your professional background, core competencies, and motivation for the role.

3. **Second Interview** – A more detailed discussion with the hiring team, which may include technical questioning, competency-based evaluation, or discussion of relevant experience.

4. **Third Interview (where applicable)** – For certain roles, an additional stage may be required, such as a presentation, case study, or meeting with senior stakeholders.

5. **Offer or Decline** – Following completion of all interviews, we will communicate the final outcome. Successful candidates will receive a formal offer subject to any required pre-employment checks.

While we endeavour to respond to all applications, this may not be possible for vacancies with high volumes of applications.