

Join Our Team.

Role: Client Support Team - Ewloe

This is a hands-on and varied role for an experienced financial services administrator who takes pride in keeping the office running smoothly, supporting the wider team and helping deliver an excellent client experience through organised, proactive and reliable service delivery.

We are proud to offer:



A positive & rewarding workplace



Competitive remuneration & benefits package



Personalised career pathways



A supportive team culture



Plenty of future opportunities

Join Our Team.

About Us

Astute Private Wealth is a respected financial planning firm providing tailored wealth management services to clients who value clear advice, personal service and long-term support. We help clients make informed decisions about their financial future by combining technical expertise with a practical, client-focused approach. Our team is committed to high standards, responsible advice and building lasting relationships based on trust, care and attention to detail.

Your Role

You will support the Client Manager and Financial Planner team by helping prepare high-quality client recommendations, reviews and records. Your role will include:

- Providing administrative support to the Client Manager, who acts as a Paraplanner for one or more Financial Planners.
- Helping to manage, record and monitor client reviews before and after meetings, ensuring client requirements progress to an appropriate conclusion.
- Liaising with product providers and third parties to obtain information, quotes, illustrations and product details for analysis.
- Researching financial products, preparing comparisons, helping to identify planning opportunities and suitable solutions.
- Maintaining accurate client records and supporting compliant, responsible business practices.
- Working with Advisers and clients to implement and maintain the Personal Finance Portal (PFP), using Intelliflo, where required.

What We're Looking For

- Strong attention to detail and the ability to work accurately with client information.
- A client-focused, can-do attitude and eagerness to learn.
- Commitment to personal development, progression and keeping knowledge updated.
- Good organisation, efficiency and willingness to take on greater responsibility over time.
- Clear communication skills and confidence working with colleagues, clients, providers and third parties.
- A proactive approach with the confidence to take ownership of tasks and see them through to completion.

Why Join Us?

At Astute Private Wealth, we believe in investing in our team's development and success. As part of our team, you'll have the opportunity to build your technical knowledge, enhance your expertise and contribute to a firm that values care, high standards, innovation and client service. We offer a competitive salary and benefits package, along with a supportive and collaborative working environment.

If you're ready to take your career to the next level, please submit your CV and a cover letter detailing your experience and why you're the perfect fit for this role to abothwell@astutepwlttd.co.uk.

Become a key player in helping our clients achieve financial success. Apply today and join the Astute Private Wealth team!

Our Values.

Our values are our guiding principles; they are the foundation on which we build the support that we provide for both our clients and colleagues.



We Care

At Astute, caring is the cornerstone of everything we do. We prioritise client satisfaction above all else and we understand that every interaction with our clients is an opportunity to make a meaningful difference in their lives.

We recognise that our greatest strength lies in our unity as a team. By fostering a culture of teamwork, empathy, and mutual support, we amplify our collective impact for our clients.



We Are Transparent

Integrity is the bedrock of our business. We hold ourselves to the highest standards of honesty, ethics, and transparency in all our dealings. From our financial practices to our client interactions, transparency and accountability are non-negotiable.



We Uphold High Standards

Excellence isn't just a goal; it's our standard. We value continuous improvement within our firm, where every team member is dedicated to consistently delivering nothing short of the best for our clients.

By encouraging our team in their continued personal and professional development, we proactively work to ensure that we can maintain a high level of service to both clients and colleagues providing informed advice and up-to-date solutions.



We Think Forwards

We don't just react to change; we anticipate it. By embracing innovation and technology we work to ensure that we continue to have the best tools available to position ourselves and our clients for success.



We are an Inclusive Team

We know that we can provide our best service by working together; supporting each other in supporting our clients. We care about working hard to nurture a spirit of teamwork, collaboration, and mutual respect among our team.

We recognise that each individual brings a perspective built on their unique life experiences and it is important to us that we maintain an environment in which every voice is heard and valued. This helps us to better understand and support our clients and colleagues.

Our Benefits Package.

Join Astute Private Wealth and enjoy a comprehensive benefits package designed to support your professional and personal well-being:

Generous Holiday Entitlement

Starting from 22 days of annual leave, in addition to bank holidays, plus enjoy an extended break during the Christmas period to recharge and spend quality time with loved ones.

Holiday Flexibility

Tailor your time off with the option to buy or sell holidays, allowing you to adjust your leave according to your personal and family needs.

Death in Service Life Cover

Receive peace of mind with a death in service benefit providing life cover worth 4 times your annual salary, ensuring financial security for your family.

Company Sick Pay Scheme

Starting with 1 month's full cover, to support you through any health challenges without financial worry.

BUPA Health Cash Plan

Help with healthcare costs, including dental, optical, and other health-related expenses, promoting your overall wellness.

Study Support

Pursue further education and professional qualifications with our study support program, including financial assistance, revision support, and time off for exams, helping you advance your career.

Cash-Back Debit Card

Enjoy savings on everyday purchases with a cash-back prepaid debit card that offers rebates on a range of transactions to enhance your disposable income.

Free Financial Advice:

Take advantage of free financial advice from our expert team, helping you make informed decisions about your personal finances, investments, and future planning.

Workplace Pension

Maximise your financial security in retirement by contributing to your Astute pension and benefit from a generous employer contribution. Make your contributions via salary sacrifice and we'll share our tax savings with you via increased contributions.

At Astute Private Wealth, we value our employees and strive to create a supportive and enriching work environment. Join us to benefit from a culture that promotes professional growth, financial security, and overall well-being.
