



# ABAKA

## Paraplanner and Administrator

Ready to take your career forward on a unique journey?

### ABAKA

We are a team of passionate entrepreneurs and industry experts with a mission to improve people's financial wellbeing, and re-invent the way the financial industry works.

We provide financial institutions, of any size, anywhere in the world, the software to thrive in the digital savings age. We do this by building, delivering and supporting conversational AI technology to power affordable and accessible advice.

The culture we've created is as great and diverse as our people!

We are problem-solvers; we love sharing ideas and opinions; we work with ground-breaking technology; and we offer exceptional benefits to our staff in an inspiring and collaborative environment. We are always looking for outstanding individuals from diverse backgrounds, who want to be part of this exceptional team.

### Job Description

We are seeking a paraplanner and administrator who will be expanding ABAKA's capabilities with our IFA, private bank, private wealth and retail bank corporate clients.

Competence and role:

- Working in collaboration with our IFA, private wealth, private bank and retail bank clients (collectively "ABAKA's clients") in order to help fulfil their end-client pension tracing and consolidation in an efficient and timely manner
- Be the subject matter expert in pension tracing and consolidation



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- The role will involve promoting ABAKA's services in a professional and FCA compliant manner

## Core Duties & Responsibilities

- Act as the key liaison point between ABAKA's clients and where necessary their end individual clients, and the various UK pension provider(s).
- Onsite initial and ongoing training with ABAKA's clients (their financial advisors, private bankers, paraplanners, practice administrators, other support functions and management teams) in the use of ABAKA's proprietary pension tracing and consolidation workflow software and processes
- Maintain operating manual and procedures for both internal and external use
- Contribute to marketing material as it relates to ABAKA's proprietary pension tracing and consolidation workflow software and processes
- Maintain and update Salesforce CRM
- Client information gathering and client liaison for pension transfer support
- Maintain clean data record and flows through ABAKA's proprietary pension tracing and consolidation workflow software
- You may at times be required to assist and provide additional support with the administrative functions at our IFA and private wealth clients

## Job Requirements

We are looking for someone with:

- Financial services experience preferably in a paraplanner or IFA administration role

Desirable:

- Taxation (J01)



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- Trusts (J02)
- Pensions and Retirement Planning (R04)
- Investments (IMC)
- Certified Financial Planner Certification

## Key skills:

- Understanding of the Financial Planning process
- Ability to achieve agreed outcomes without supervision
- Prioritise and plan own workload
- Detailed and accurate
- Excellent interpersonal skills, both written and verbal
- Ability to multitask and prioritise effectively

## Financial Skills

- Ability to analyse financial issues
- Ability to collate and present financial information
- Ability to understand and analyse financial and non-financial data

## IT Skills

- Proficient in Microsoft Word, Excel, Outlook and Salesforce
- Experience of Origo is a plus
- Knowledge of various financial planning software (e.g. Voyant) is a plus

## Personal Skills

- Communication: Ability to communicate effectively both verbally and in writing, and to deal with individuals at all levels
- Team working: Ability to contribute as part of a team, and deal with individuals at all levels within the business
- Relations with others: The personal qualities and skills that promote open and constructive relations with colleagues and customers
- Flexibility: The flexibility for and commitment to continual service development and improvement

## Language skills:

- Fluent in spoken and written English.
- Any additional language beyond English is a plus.



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Personal skills:

- Demonstrated ability to analyse and solve problems.
- Ability to work both on your own and in a cross-disciplinary team.
- Ability to interact with internal and external stakeholders.

Ready to take your career forward on a unique journey? [Apply now!](#)

ABAKA is an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, gender, sexual orientation, gender identity or expression, religion, national origin, marital status, age, disability, veteran status, genetic information, or any other protected status.