



GILSON GRAY

LAW • PROPERTY • FINANCE

Practice Support Specialist (PSS)

Department: Financial Management

Location: Dundee, Edinburgh, or
Glasgow

Contract type: Full-time

About Gilson Gray

Gilson Gray Financial Management Ltd is a comprehensive Wealth Management organisation that also connects with the wider Gilson Gray group who offer in addition; expert legal advice, and property service. We support clients throughout their entire lifetime. The Financial Management team have decades of experience in the market and can advise on financial plans and products for anyone at any stage of life.

Based in Edinburgh, Glasgow, Aberdeen, Dundee, North Berwick and Lincoln we focus on ensuring we provide the highest level of advice and ongoing service to our clients. We pride ourselves in looking after our clients personally and providing the highest standard of service.

Our Team

We are looking to hire a highly driven Practice Support Specialist to join one of our successful Financial Management team in Dundee, Edinburgh or Glasgow.

We are an enthusiastic team supporting each other to achieve a great working environment. We value each other's expertise and opinion and pride ourselves in offering an inclusive, enjoyable and motivating place to work.

The Role

We are looking to further strengthen our current team with the appointment of Practice Support Specialist (PSS). As a PSS at Gilson Gray Financial Management you'll be responsible for:

- Advanced knowledge in Excel and experience of using Salesforce
- Provide support on products and services to Advisers and Clients
- Prepare, complete, and submit investment related documents such as withdrawal forms and trust forms
- Process withdrawals, fund switches, letters of authority and update on Salesforce
- Performing day-to-day administrative tasks such as responding to Client emails and requests
- Issuing Letters of Authority for the Practice and day-to-day management of this key activity
- Managing the Practice pipeline of new business and contributing to meeting monthly targets by diligent oversight of this
- Managing relationships with Clients when required on behalf of Advisors
- Being a key point of contact for the Practice to the St. James's Place Administration Centre
- Responsible for all incoming and outgoing paper Client documentation to ensure 100% accuracy and meets brand requirements
- Ensure that files are complete post-sale on Salesforce with all required client identification documentation and necessary application forms
- Maintain accurate client information, files/records, ensuring that clients are placed into a review system on Salesforce as agreed with the Partner



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- Prepare portfolio valuations as requested
 - Process new business illustrations, applications and fund switches
 - Support the advisers to ensure the end-to-end business process is adhered to and tracked efficiently in line with regulatory standards
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Required Knowledge and Experience

- Previous experience in an office support role, ideally in financial services or related sector
- Knowledge of financial services regulations and legislation
- Experience of using client management systems
- Broad experience of Microsoft Office (Outlook, Word, PowerPoint)
- Advanced knowledge of Excel and experience of using Salesforce

Our ideal candidate would also

- Have excellent social and interpersonal skills dealing with clients
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- Have excellent communication, organizational and attention to detail skills
- Problem solving and analytical skills
- Ability to work as part of a large team and contribute to the overall business aims
- Ensure that your actions are consistent with the culture of the business
- Consistently strive to be the best you can be

Benefits

- A competitive salary with annual review and potential bonus award depending upon performance
- 32 days holiday a year (inc. Bank Holidays)
- Birthday off
- 3 x Death in Service Benefit
- Hybrid Working
- Membership of an occupational pension scheme
- Wellbeing initiatives and opportunity to access online Health Provider

This is an exciting time to join us. Think this is for you?

Get in touch for a confidential chat about how you can become part of the team at recruitment@gilsongray.co.uk



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