



Centennium House
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eqinvestors.co.uk

Investment Operations Administrator

Location: City of London (EQ has a flexible working policy)

Salary: £25-30k depending on experience + bonus

Start date: ASAP

About us

EQ Investors' (EQ) award-winning, discretionary fund management arm works with financial intermediaries primarily in the UK but also overseas. EQ Investors' Positive Impact & Future Leaders propositions focus on sustainable and impact investments and offer both model portfolios on multiple platforms as well as bespoke portfolios.

EQ is also Certified B Corporation (having been one of the Founding firms in the UK), an internationally recognised standard for companies that believe in business as a force for good. Making a positive contribution to the wider community is a core part of our business philosophy.

The role

This is a rare opportunity to join an established operations and support team and to be an integral member of EQ's Operations/Client Servicing areas. The role will report to the Head of Investment Administration.

The Investment Operations Administrator will be a key part of the Positive Impact Investing team. With essential interactions with a multitude of third parties (Platforms/IFA's) as well as internally, the role will suit an individual who has attention to detail, a good work ethic and strong communication skills.

Responsibilities will also include (but won't be limited to):

- Accurately updating our internal CRM database – Filemaker
- Liaising with other Ops staff to onboard portfolios and new funds on platforms
- Responding to queries on fees, platforms, performance
- Support FE Transmission licences management
- New client onboarding: Sending agreements & confirming when access granted, welcome emails for new IFAs
- Monitoring and reporting flows, setting up and maintaining client fee rebates where applicable

Knowledge and experience

- Circa 2 years' investment operations/client services experience gained within the wealth management/asset management industries
- Relevant experience of working with and servicing financial advisers and platforms
- Strong communication and relationship management skills
- Good Microsoft excel skills
- Numerate with a strong attention to detail
- Good organisation and planning skills – able to work to tight deadlines