SPM Financial Services

Life & Pensions Administrator - Location: Drogheda.

Salary: €40,000+ Dependant On Experience

Role Overview

Our client is seeking an experienced Life & Pensions Administrator to provide high-quality administrative and technical support to Senior Wealth Advisors. This is a key role within the business, requiring hands-on knowledge of life and pension products.

The successful candidate will manage new business and existing client servicing across life, pensions and investments, to ensure all client applications, reviews and queries are processed accurately and efficiently.

Key Responsibilities

• Provide a high standard of administrative support to the Wealth Advisors

• Manage the processing of new business applications for pensions, investments and life assurance

• Deal directly with all major life companies to ensure timely and accurate processing of policies

• Administer policy reviews and assist with tax-related and product-specific queries

• Liaise with clients by phone and email, keeping them informed of application and review progress

• Prepare client meeting documentation and support consultants before and after meetings

• Organise and coordinate meetings and schedules

• Ensure all client information is accurate, compliant and up to date

• Maintain detailed and accurate client records

• Responsible for Anti Money Laundering (AML) documentation

• Assist with ad-hoc projects and business development initiatives as required

Skills, Experience & Qualifications

• QFA qualification – OR Working towards same

• Minimum 2 years' experience in a regulated financial services environment

• Previous experience working in a broker's office is preferable but not essential

• Hands-on experience dealing with all major life companies

• Strong understanding of life, pension and investment products, including reviews and tax-related matters

• Excellent organisational skills with strong attention to detail

• Proven ability to manage workload independently and prioritise effectively

• Strong interpersonal and communication skills

• High standard of customer service with a proactive, problem-solving approach

• Proficient in Microsoft Word, Excel and PowerPoint

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Apply in strict confidence to: chris@spmfinancialservices.ie