



# McInroy & Wood

PERSONAL INVESTMENT MANAGERS

## **McInroy & Wood Limited – Investment Administrator**

A full-time position has arisen for an experienced Investment Administrator to join our team based in Haddington.

McInroy & Wood is a thriving and independent private client investment management firm managing over £2.1bn worth of clients' investments, which are invested directly around the world. Housed in its own purpose-built premises in Haddington, with additional offices in London and Harrogate, we are proud of our collegiate approach. We strive to build a diverse team, recognising the many benefits that this brings to our clients and colleagues.

### **The role**

The role involves ensuring the provision of an effective and efficient administration service for private clients of the firm.

### **Key attributes**

A meticulous approach to the work, together with strong organisational skills and an eye for detail are also crucial as is computer literacy (Word and Excel).

### **Responsibilities**

- Dealing with client matters, liaison with internal departments, agents and clients to ensure a high level of service is provided.
- Checking and distributing quarterly client valuations and annual suitability review records.
- Validating and processing security and cash transfers for private client portfolios.
- Maintenance of client's records in accordance with external and internal standards and ensuring these are accurate and up to date on all systems.
- Contribute to project development, whether internal or regulatory changes.
- Contribute to regular risk assessments and continuous improvement initiatives.

### **Skills and Expertise required**

- Experience in a similar role would be advantageous.
- Strong attention to detail and ability to work to a high standard of accuracy.
- Strong organisational skills and the ability to meet deadlines and manage multiple tasks.
- Team worker with proactive flexible approach.
- Good communication, both written and oral.

### **What we offer**

Salary: Competitive, depending on experience.  
Holidays: 25 days per year; increases to 30 days depending upon time spent with company.  
Pension: Group personal pension scheme, defined contribution. Company contributes 7% of salary p.a.  
Healthcare: Private healthcare insurance.  
Life Assurance: 4 x salary Death in Service cover.  
Profit Share: Eligible for firm's profit-share on successful completion of probationary period.

**Closing date: 30<sup>th</sup> June 2022**