

McInroy & Wood Limited is a leading independent private client investment manager based in Haddington, East Lothian. We manage £1.8bn of client assets invested globally, and we pride ourselves on our collegiate culture and commitment to building a diverse and high-performing team.

We are seeking an Investment Administrator to assist in providing an excellent administration service to private clients of the firm and helping strengthen data quality and process efficiency across the team.

Key attributes

The Investment Administrator plays a key role within the Private Client Administration team and is responsible for providing a high standard of service by staying ahead of clients needs and taking proactive steps to meet them. The role requires attention to detail, responsiveness and reliability along with clear communication skills and professionalism to deliver exceptional client service. Collaboration is essential and working in a team and contributing to a positive culture assists with overall efficiency along with individual development. High levels of integrity are essential to uphold Consumer Duty standards. The successful candidate will be naturally curious, confident with technology, and motivated to improve processes, data flows, and reporting. They will be agile and proactive in their approach, comfortable managing deadlines, and able to adapt to a wide variety of tasks.

Training, mentoring, and support for relevant professional qualifications will be available.

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.

Essential competencies & skills

- Strong attention to detail and ability to work to a high standard of accuracy.
- Strong organisational skills with the ability to manage multiple tasks, adapt quickly, and meet deadlines.
- Proficient in Microsoft Excel
- Comfortable learning new systems and using technology to improve processes.
- Team oriented, proactive and flexible in approach.
- Clear and confident communication skills, both written and oral.

Preferred competencies & skills

- Experience in a similar role would be advantageous but not essential.
- Familiarity with Power BI, Adobe InDesign or similar tools.
- Genuine interest in automation, data quality, or process optimisation.

What we offer

Salary:	Competitive.
Holidays:	25 days per year, increasing to 30 days depending upon time spent with company.
Pension:	Group personal pension scheme, defined contribution. Company contributes 7% of salary p.a. We offer a pension salary exchange arrangement to all active scheme members.
Healthcare:	Private healthcare insurance.
Life Assurance:	4x Death in service.
Training:	All training costs and professional qualifications will be covered by the Company.
Social Commitment:	Opportunity of paid leave for volunteering and charity work.
Workplace:	A friendly, supportive environment in bright and modern office premises. Free on-site car parking with access to an EV charger.
Hybrid Working:	Upon completion of training, there is the opportunity to transition to our hybrid working model, requiring 3 days per week in the office.

To apply

Please send your CV and covering letter of no more than 500 words, explaining why you wish to pursue a career with McInroy & Wood to: recruitment@mcinroy-wood.co.uk.

Please note that we are currently unable to sponsor candidates for this position.

Closing date: Sunday 14 June 2026