

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

McInroy & Wood is a thriving and independent private client investment management firm managing nearly £2bn 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 & expertise required

- Experience in a similar role would be advantageous but not essential.
- 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.
- Applicants must hold a minimum of National 5 (or equivalent) in Maths and English.

What we offer

Salary:	Competitive, depending on experience.
Holidays:	25 days per year, increases to 30 days dependent upon time spent with Company.
Pension:	Group personal pension scheme, defined contribution. Company contributes 7% of salary pa (employee contribution of at least 2%). We offer a pension salary exchange arrangement to all active scheme members.
Health:	Private healthcare insurance.
Life Assurance:	4 x Death in Service.
Workplace:	A friendly, supportive environment in bright and modern office premises. Free on-site car parking with access to an EV charger.

Closing date: 17 August 2025