Our employee-owned, independent financial planning firm is looking for its next Client Relations Administrator

The Role .... Client Relations Administrator

The role of the Client Relations Administrator is to provide support delivered to an exceptional standard to both our Individual and Enterprise clients, along with support to both the Financial Planners and the Technical Team in undertaking their roles.

With a passion to want to deliver an exceptional service to our clients to ensure they live their very best lives through creativity and excellent financial planning.

Our mission is to get all our clients talking about their boosst experience with their friends and family so they too want to join the boosst community!

Challenge

Our internal desire to be as good as we can be means that constant personal growth and improvement is an expectation. You can expect to be challenged to improve everything you touch - and you can look forward to support from the boosst team as you grow and flourish.

The working environment is rather special

Passers-by can be forgiven for confusing our lakeside office for a boutique spa. We have no doubt that you'll quickly settle into your new home. Our rural location means that parking is free and you'll have use of our electric car chargers.

If it's worth doing, we do it properly

If something will improve the day-to-day life of our team, we are not afraid to spend money on it. You can expect IT that fits your working needs and technology that 'just works'.

Building deeper relationships

We work as a team, learn from each other, and have fun. That camaraderie is also expended beyond work and projects into regular team events, marathon relays (optional!) and charity days.

We value your wellness

We don't like to see our team working evenings but that doesn't mean you have to leave… you can always pop next door to the boosst gym. Our appointed Wellness Ambassadors are in charge of all things wellness… from activity challenges to home pamper kits. Your wellness is our priority.

The opportunity:

- To be one of the go to people for our wonderful clients. You will build relationships which will last through our clients' lifetime and be a key cog within our small and very friendly team.
- To train to become a subject matter expert within the business in areas that we identify you excel in, to
- support the entire team.
- boosst is dedicated to growing it's people, with investment and remuneration rewards on meeting qualification milestones.

The responsibilities ....

- Working with our chosen CRM and keeping data quality to a high standard.
- Working with established processes and procedures to ensure that the service delivered to our clients is exceptionally high at all times .
- To actively contribute to continuous enhancement of our service delivery.
- Working within our desired turnaround times.
- Liaising with product providers and other relevant third parties.
- Individual and Enterprise workflow and task delivery.
- Working to meet deadlines.
- Assisting the technical and planning team with:
  - Preparing paperwork for client meetings.
  - Planning and product research.
  - New business submission and follow up to prompt conclusion.
- Continual Professional Development.
- Working with the rest of the team to ensure boosst meets it's objectives.

The 'must haves' ....

- At least 5 years working in Financial Services, ideally within a financial advisory or planning practice.

The successful candidate will have:-

- Experience of using and maintaining a financial planning based CRM.
- Experience of using a financial platform, opening wrappers and money management.
- Experience in challenging providers to achieve great outcomes for clients.
- Excellent communication, spelling, grammar and accuracy.
- Exceedingly high attention to detail.
- A curiousness that allows them to explore new things an understand the 'why' in all we do.
- Motivation and excellent time management skills.
- A desire to learn, taking each day as an opportunity to improve something for you personally, or boosst.
- Ability to think outside the box and apply common sense, for the right outcome!

The 'nice to haves' ....

- Experience of using cashflow tools, ideally Truth.
- Experience of Apple hardware & software.
- Experience of Intelliflo Office CRM.
- Experience of the Transact Platform.

The benefits ....

- Competitive salary and pension contribution.
- Productivity bonus, in which all team members are included.
- Tax free bonus, up to £3,600 per year, courtesy of boosst's employee ownership status.
- Group Death in Service & Private Medical Insurance.
- 22 days holiday, increasing annually, up to 27 days upon 5 years service, plus bank holidays.

The non-monetary rewards ....

- Job security brought by employee ownership.
- All professional memberships, relevant conferences, studies and exams fully-funded by boosst.
- Monthly internal training sessions to ensure the continued development of our team.
- Healthy team social and wellness budgets for the whole team to enjoy.

About boosst ....

We are an independent employee-owned firm of Certified Financial Planners based in the Bedfordshire countryside in our beautiful, purpose-built, eco, lakeside office, close to Milton Keynes and M1 Junction 13.

The move to employee-ownership in October 2024, shows our dedication to our clients and our team with boosst becoming infinite.

We are a multi-award winning CISI Accredited Firm and hold British Standards certifications BS8577 & BS8543, along with all financial planners certified to ISO22222.

Our qualifications, accreditations and awards show our dedication to investment in our people and processes for the benefit of our fans, the clients that are the wider boosst community.

If there is a need to relocate for the role, some of our wonderful fans (clients) have rooms to rent in their homes at affordable prices. Based minutes from the office in the countryside, but close to the hustle of Central Milton Keynes.

Core values ....

Life is for Living

Money is a tool, not an aspiration. We design clear, simple advice that supports meaningful life choices and gives people permission to live well, rather than overwhelming them with complexity. Financial planning should sit quietly in the background, enabling life rather than dominating it.

Fierce Independence

We operate unequivocally from our clients' side of the table. We actively resist anything which could pressure or compromise objective advice, and we are prepared to challenge convention when it is not in our clients' best interests. Independence is something we fiercely protect through our decisions and our behaviour.

Built to Last

As an independent, employee-owned business, we exist to support families over decades and across generations, not to maximise short-term outcomes. We favour stewardship, continuity, and trust, making decisions today with tomorrow firmly in mind. For our team, this means a 'job for life' is on offer, as the risk of a third-party sale, merger or PE acquisition are all off the table.

BS 8577 CERTIFIED
FINANCIAL ADVICE AND PLANNING SERVICES

CISI CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT
ACCREDITED FINANCIAL PLANNING FIRM OF THE YEAR AWARD — WINNER 2025 —

BS 8453 CERTIFIED
COMPLIANCE FRAMEWORK FOR REGULATED FINANCIAL SERVICES FIRMS