# Client Account Manager

## About Us

Beacon Wealth Management is seeking a Client Account Manager to join our Chartered Financial Planning firm in Kimbolton, Cambridgeshire.

We're looking for someone with strong organisational skills and a client-focused approach to support our Financial Advisers, manage client relationships, and ensure smooth day-to-day administration.

## Role Overview

The Client Account Manager will support our Financial Advisers and clients by co-ordinating tasks and providing high-level administrative support. You will be the primary contact for clients, ensuring a seamless experience through strong organisation, attention to detail and excellent service. This role is ideal for a proactive professional who enjoys working in a client-focused environment with a collaborative team. Your contribution will be vital in strengthening client relationships and maintaining the high standards we are known for.

## What you will be doing

- Provide day-to-day administrative support to Financial Advisers, including diary management, appointment scheduling, and meeting preparation.
- Act as the main point of contact for clients and new enquiries, building strong relationships through clear and timely communication.
- Produce client reports and documentation where required, ensuring accuracy and professionalism.
- Maintain up-to-date and compliant client records across internal systems
- Liaise with researchers and team members to allocate and progress client work efficiently.
- Support ongoing learning and development through monthly CPD and maintenance of personal Training & Competence records.
- Take part in monthly staff meetings and contribute to wider team initiatives, with flexibility to support evolving business needs.

**About you**

- Excellent communicator, confident engaging with clients and colleagues at all levels.
- Organised, detail-oriented, and able to manage time effectively in a fast-paced environment.
- Positive and proactive, with a strong sense of personal responsibility and professionalism.
- Customer-focused with a high standard of service and a professional, friendly manner.
- Previous experience in financial services or a client support role is desirable, but not essential if you bring strong transferable skills and a willingness to learn.

As a member of non-advising/qualified staff, whilst all help and assistance should be given to both clients and prospective clients over administrative issues, under no circumstances should advice be given that might be construed to be financial advice.

**What we offer**

- Competitive Salary
- Generous Employee Benefits Plan
- Pension contributions matched up to 5%
- 35-hour week with a 4pm finish on Fridays
- 20 days holiday (increasing 1 day per year up to a maximum of 23) plus Bank Holidays, 3 days at Christmas, and your Birthday off
- Flexible and Hybrid working available
- Regular team-building activities

**How to apply**

Please send your CV to Pippa Ellis at pellis@beaconwealth.co.uk