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JOB TITLE: Analyst - Data Processing REPORTS TO: COO

Kingswood Holdings Limited (trading as Kingswood) is an AIM-listed integrated wealth management group, with more than 16,000 active clients and c. £5 billion of Assets under Management. It has a growing network of offices across the UK as well as offices in New York and Johannesburg. Clients range from private individuals to some of the UK’s largest universities. The Group’s vision is to become a leading global provider of trusted wealth planning and investment management solutions to clients, underpinned by investment in people and innovation in technology to support our advisers and clients.

**RESPONSIBILITIES**

* To support data clean-up from prior acquisitions as well as provide support for new acquisitions
* Takes responsibility for the accurate maintenance of computerised standing data records, including client data and data for other 3rd party financial services suppliers.
* Ensures that data errors, transactional delays and operational problems are rectified in a timely manner
* Verify data by comparing it to source documents
* Retrieve data from the database or electronic files as requested
* Liaises with other departments as needed.
* Transferring data from paper documents into computer files or database systems
* Transferring data into the database system provided directly from clients
* Creates or modifies mail merge, other word processing and spreadsheet templates in order to produce standard letters and administrative documents to the required standard.
* Creates or modifies system reports using report generator.
* Takes responsibility for all system housekeeping, including the taking of regular file back-ups for audit, recovery and disaster planning purposes.
* Provides administrative support as and when required to the Wealth Planning Operations department

**SKILLS AND EXPERIENCE**

* Strong Word and Excel skills
* Good communication skills
* Conscientious, with good attention to detail and possess initiative
* Self-starter with strong interpersonal skills
* Financial services experience is advantageous but not essential

If you are interested, please send your CV to Linda.Tottem@Kingswood-group.com