

# Work Tasks

## Example Task

Client Acquisition  
Managing existing client relationships  
Business Strategy  
Marketing - Writing external articles/website  
Overall compliance responsibility/oversight/ML  
HR oversight/recruitment/appraisals/initial training  
Prospecting - professional connections  
PII renewal  
Budgets  
New Business Processing  
Obtaining applications and illustrations  
Obtaining valuations  
Existing Business servicing  
Answering phones  
Post  
Filing  
Fund switches  
Client Review Meeting Process  
Diary chasing  
Ordering of stationary  
Ordering consumables  
Organising events/seminar  
Pre meeting preparation  
Pre meeting confirmation letter  
Review meeting confirmation letter  
Update CRM  
Inputting cashFlow  
Compliance admin  
Client meeting & greet  
Working through file note actions

Formulating Advice  
Suitability Reports  
Financial Plans  
Changes to RWL templates  
Responding to client emails  
Answering phones  
Platform due diligence  
Recommending rebalance & cost implications  
Responding to client emails (technical queries etc)  
Carrying out calculations for withdrawals/encashment  
Analyse client needs and provide recommendations  
Attend client meetings / Follow up  
Pre investment committee organisation  
Portfolio recommendation  
Portfolio due diligence  
Process implementation  
Obtaining applications & pre fill  
LOAs  
Data gathering  
Book keeping  
Invoicing  
Payment of invoices  
Expenses  
Gabriel  
Payroll  
Companies House Return

*Advise Better*  
*Live Better*