

## **OPERATIONS MANAGER - PERSONAL FINANCIAL PLANNING**

### **Head Office, Worthing, West Sussex**

We are looking for someone to head our EA and CSA Teams to ensure all offices follow operational and compliance processes and to ensure all offices use back office system and follow policies and procedures

Salary is negotiable dependant on experience, skills, and qualifications.

The main responsibilities of the role will include:

To oversee the smooth running of PFP operational support in head office and globally.  
Specifically:

- To recruit, train and develop individuals and conduct regular team meetings and performance reviews of the team leaders.
- To ensure all personnel issues are dealt with in line with company policies and procedures.
- To investigate and escalate any admin service level complaints in line with company procedures.

To ensure the flow of PFP work is carried out efficiently and completed in line with company KPIs and SLAs.

Empower office managers to solve their own tactical problems and challenges.

Operational oversight and training to ensure the individual teams are following procedures and policies.

Liaise with office managers and department team leaders to ensure any changes to instructions are implemented.

Responsible for escalating issues and liaising with Platform providers.

Liaising with the Compliance Officer and Chief Operations Officer as required to ensure that all significant procedural changes are authorised and compliant.

To feedback and communicate any information to the Board that may have a negative impact to the business.

Any other reasonable request or comparable duties as requested by the Chief Operations Officer.

You will ideally hold a Certificate in Investment Operations or equivalent and experience managing Operations Teams within the Financial Services sector.

The key skills required are:-

- Attention to detail
- Ability to hit deadlines
- Good IT knowledge and ability to work on own initiative
- Excellent communication and ability to maintain confidentiality.

For further information please contact:

**Angela Parrish – HR Manager**  
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