

Pacem *Advisory*

Operations Co-Ordinator

We help high net worth *families*,
affluent retirees and entrepreneurial
business owners find *clarity* and *vision*
in their business and personal finances,
by providing strategic **wealth**,
accounting and tax advisory.

Where we *started...*

2017

2025

5 People

28 People

- **Team of 28** including Management, Financial Advisory and Accounting & Tax teams.
- 2 x Accounting & Tax *acquisitions*
- 1 x Financial Advisory *acquisition* of Redrock Financial in 2019 (inc. £40 million)
- **95%** Client Retention rate from acquisitions.
- 5 x *Employer & Business Awards*
- **388** Financial Advisory clients
- **270** Accounting & Tax clients.

For Business - For Life

We help *high net worth families, affluent retirees and entrepreneurial business owners* find clarity and vision in their business and personal finances, by providing strategic **wealth, accounting and tax advisory**.

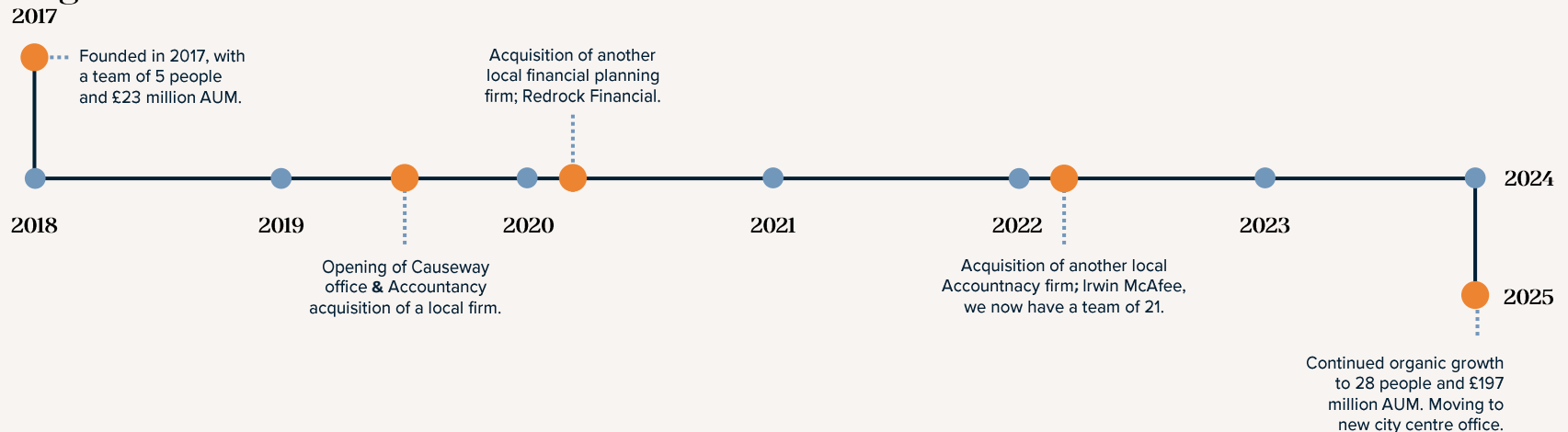
Our 4 Unique's:

- Wealth, Tax & Accountancy as one advisory service
- Tech driven business that allows our team to focus on clients & not back-office work
- Exceptional Customer Service
- Credible technical knowledge to work with clients North & South of the border.

Who we are...

Who we are...

Pacem is a boutique firm bringing together **Financial Planning, Accountancy, and Business Advisory** in a truly integrated way. We pride ourselves on being people-focused, building close, long-lasting relationships with our clients and supporting them at every stage. Just as we guide our clients, we're committed to helping our team realise their potential through **mentoring, coaching, and professional growth**. Our culture is built on **well-being, collaboration, and a supportive ethos** that reflects our values and drives us forward together.



- Our team has grown from 5 people to 28 people.
- In our Financial Planning business our client Assets under Management have grown from £23 million in 2016, to £197 million at present.
- We have over 600 clients across the firm.
- Pacem won East Belfast's 'Employer of the Year' Award in 2020 & 2022, the 'Best Wellbeing in the Workplace' Award in 2024 and the 'Best Place to Work' Award in 2025 at the Irish News Workplace & Employment Awards.
- Pacem focuses on working with small to medium sized business owners to provide a coordinated financial plan to provide for both their personal and business needs.

Pacem Workplace *Awards...*

Best *Place* to Work

The Irish News Workplace & Employment Awards 2025

Best *Wellbeing* in the Workplace Strategy

The Irish News Workplace & Employment Awards 2024

***Employer* of the Year**

Eastside Awards 2022 & 2020

Business *Growth*

Eastside Awards 2022



Accountancy & Tax Advisory...

Accountancy Essentials

Real-time, bespoke, personal and precise... Our bookkeeping, compliance and accountancy essentials service provides clients with **clarity, insight and peace of mind.**

- Cloud Accounting Package
- Payroll and Pension
- Full bookkeeping
- Year end accounts
- Personal Tax Planning
- VAT returns
- Monthly Management reporting
- Tax Investigation Service

Business Advisory

From pre-start to exit... providing timely information, **unmatched expertise** and diligent insight where and when it matters... we **add value way beyond the compliance work.**

- Specialist Start up advice for new businesses
- Cashflow Forecasting and Budgeting
- 'What if' Scenario Planning
- Professional Tax Advice
- Industry Specific Expertise
- Succession Planning
- Business Valuation
- Strategy and Growth Planning

Our Core *Values...*

Good to Be Around

- Good to Be Around
- Easy to get on with.
- Good to be around, even under pressure.
- Genuinely care about people, takes time to talk to people.

Do things the right way, rather than the easy way

- Reliability; complete assurance something will be done and be done right.
- Great organisational skills, attention to detail, and the ability to pull things together.
- Diligence and quality are core to delivering the client service.

Enthusiasm – gets stuck in

- Will do whatever is required.
- Determination to see things through.
- Initiative & commitment to develop.
- Appetite to learn & take on new challenges.

Proud of Pacem... and everything that we do individually and collectively

- Everything matters; we take pride in:
- Our clients – the work they do and our relationships with them
- Our team and culture
- Our office and its environment
- Our communications (written and verbal)
- Our social impact and outreach activity
- Our processes

Growth mentality – trying to push the boundaries

- To innovate and evolve, looking for the next opportunities.
- Never satisfied and always trying to improve.
- Purpose in our work and our career development.
- Ensuring we all retain the bigger picture and are asking 'why?'

Always thinking about the client

- We appreciate the opportunity and the business our clients create for us.
- We're here to make their lives easier.
- Working hard for our clients - going over and above expectations.
- Having an inquisitive and questioning approach to client work.
- Focusing on the clients' needs and wants and not what suits us best.

Market Leading Employee Benefits: Pacem *Good Job* Strategy

Remuneration

- Competitive Salary
- 5% Pension Contribution
- Individual Performance Bonus Eligibility
- Client Referral Bonus
- Recruitment Candidate Referral Bonus



Added Value Benefits

- Additional Loyalty Days – 20 Days Holidays increasing by 1 Day up to a maximum 5
- 9 Statutory Days
- 5 Closure Days
- Income Protection
- Life Cover
- Working from Home Allowance
- Enhanced Occupational Sick Pay Scheme
- Enhanced Parental Leave



Work / Life & Wellbeing

- Flexi Time System – Flexible Start/Finish Times
- Hybrid Working
- Work well Fridays
- Sabbatical (4 Weeks at 4 Years Service)
- Unum Health Services – Remote GP, Physio Appt Access
- Help @ Hand Wellbeing App
- Team Wellbeing Initiatives
- Team Events



Career Growth & Progression

- Financial Support for Training/Qualifications relevant to role development
- Management Mentoring
- Annual Career Progression Meetings
- 1:1 Coaching
- EQI Emotional Intelligence Skills Development



**Please note that eligibility for some of the benefits require successful completion of probation or progression from an internship / placement into a permanent role*

...The *Role*

Role *Details...*

Operations Co-Ordinator

- **Location** – Based at Pacem Advisory Offices, 2-10 East Bridge Street Belfast (Hybrid working Patterns available)
- **Hours** –36.5 hours per week
- **Salary** – Competitive
- **Reports to** – Group Operations Manager
- **Closing date** – Please submit your C.V. and a Cover Letter by **12pm 30th January 2026** to the People & Talent Manager on frances.neely@pacem-advisory.com

Long-Term Objectives

As the business is constantly growing, we will need valued members of the firm to help us deliver operational excellence, ensuring exceptional client outcomes.

The *Role*...

The successful candidate will be central to the smooth, efficient, and exceptional running of the business. Working in close partnership with the Operations Manager and Managing Director, you will help shape the operational heartbeat of Pacem Advisory, ensuring that our teams are supported by clear processes, strong governance, and a consistent commitment to exceptional client service.

In this role, you will contribute directly to how the business operates day-to-day and how it evolves strategically. Your work will ensure that our internal systems, workflows, and data processes support the high standards we set for ourselves and the experience we deliver to our clients.

To excel, you will need to be highly organised, proactive, and assertive. You will be responsible for managing your own workload while actively helping others prioritise, stay accountable, and work within clearly defined processes. There would be the opportunity to upskill through Project Management or Process Improvement Qualifications if applicable.

Our firm operates in a fast-paced and dynamic environment, so the ability to meet deadlines, adapt quickly to change, and maintain composure under pressure is essential.

Key *Role Areas* ...

*Project
Execution*

*Workflow
Management*

*Data
Governance*

*Operations
Coordination*

Detailed *Duties...*

Project Execution

Supporting the effective delivery of company priorities by coordinating projects, improving processes, and removing operational barriers. Working closely with senior leadership, the role ensures initiatives are tracked, communicated, and implemented successfully.

- Collaborate with the Operations Manager and Managing Director to prioritise projects and development based on strategic goals.
- Ensure projects are well monitored, tracked and implemented.
- Maintain clear project documentation, timelines, action logs, and status reports to support transparency and accountability.
- Address questions, challenges, and barriers to implementation of any projects / ROCKs, offering practical solutions to ensure delivery against expectations.
- Identify, track and record issues at all levels across the business.
- Collect, analyse, and report on operational data and KPIs to inform decision-making and measure project effectiveness.
- Coordinate resources (people, time, tools) to support efficient project execution and day-to-day operations.

Workflow Management

Designing, building, and maintaining robust workflows that underpin our service model; implementing and teaching these processes across the team; and ensuring clear documentation, ownership, and accountability throughout the business.

- Working with leadership & the team to draft of end-to-end workflows that support the firm's financial planning, client servicing, and operational processes. Creating templates, process maps, and supporting materials to ensure clarity and consistency.
- Engage with Planners, Paraplanners, Analysts, and Interns to ensure workflows reflect practical needs and client journey stages.
- Deliver training sessions, demonstrations, and step-by-step guidance to support team members in adopting new processes.
- Provide one-to-one coaching to ensure individuals understand their responsibilities within each workflow.
- Track workflow adherence and identify gaps, inconsistencies, or deviations requiring corrective action within existing processes and design improved workflow solutions.
- Report workflow performance insights to the Operations Manager and Managing Director, recommending improvements where necessary.

Data Governance

Ensuring the integrity, accuracy, and effective management of business data so the firm can make informed decisions, meet regulatory obligations and maintain confidence in the information used across all functions.

- Reporting and record keeping – leading and supporting the business to ensure high-quality data and consistent record-keeping practices across all areas.
- Ensure back-office systems are kept up-to-date by team members.
- Define and produce meaningful MI to help the leadership team drive high performance and exceptional customer service.
- Prepare monthly MI information for the leadership team, highlighting any areas/issues which require attention.
- Maintain an update-to-date data controllers' spreadsheet and ensure that all systems meet relevant regulatory requirements.
- Support the Group Operations Manager with FCA reporting data to meet regulatory deadlines.
- Ensure accurate records of all training & competence activity.
- Maintain data throughout the year to ensure that the annual professional indemnity returns can be made in a timely and accurate manner.
- Keep detailed records of follow up activity post audits.

Operations Coordination

Working closely with the Group Operations Manager and Managing Director to help the business run and operate exceptionally.

- Providing support with implementation of ROCKs/Projects and strategy actions as required.
- Assisting the Group Operations Manager and Directors with the management of daily operational activities.
- Preparing and maintaining operations documents and reports for Quarterly and Annual Business Strategy.
- Assist with monitoring, controlling and managing business operations to meet client expectations and company goals through weekly scorecard and business MI.
- Assist with ensuring that all business service activities comply with relevant acts, legal & regulatory requirements and ethical standards as well as company standards and procedures.
- Assist with identifying operational problems and resolving them in a quickly and timely manner.
- Work with the Operations Manager and other team members to ensure focused training plans are in place, being followed and communicated about regularly.
- Assisting with the recruitment and onboarding of new employees and the implementation of any changes to people or team.
- Champion a culture of accountability, ensuring all team members take responsibility for following and maintaining agreed processes through regular debriefs and updates.

Requirements...

We *require* the successful candidate to have:

- 2 – 3 Years minimum experience working within a Financial Planning Firm.
- BSc Hons Degree in Business or related discipline, Mathematics, Economics would be desirable but not essential.
- Experience in an operations coordinator role in a financial planning business is desirable but not essential.
- Proficient in technology incl. CRM systems, document management systems, Microsoft Word, Excel, electronic diary management, and general office equipment.
- Experience of leading, training and coaching others.
- Highly organised, methodical, analytical and disciplined.
- Excellent communicator (both verbal and written).
- Excellent time management skills.
- Adopts apposite attitude, willing to assist other when busy.
- Able to work under pressure and comfortable with ambiguity.
- Excellent ability to multi-task, plan and prioritise workload.
- Self-starter with strong problem solving skills.
- Ability to work efficiently with minimal supervision.
- Excellent people management skills.
- Ability to work with a high level of confidentiality and sensitivity.
- PRINCE 2 Practitioner, Lean Six Sigma or equivalent project management / process improvement qualification is Desirable but not Essential.

Contact Us...

Contact Name: Frances Neely

Telephone: 02890996948

Email Address: Frances.Neely@pacem-advisory.com

Website: www.pacem-advisory.com

Address: 3rd Floor, 2-10 East Bridge Street, Belfast, BT1 3NQ

For Business - For Life