Pacem

FINANCIAL ADVISORY

Financial Advisory
Platform & Servicing Specialist (Administrator)

Pacem

As one of Northern Ireland's leading Financial Advisory Firms, Pacem is a boutique Practice which offers a unique Financial Planning & Accountancy Business Advisory service. As a company we are people focused, and we have a very close relationship with our clients. Our culture is that we want all team members to realise their potential and we provide this through mentoring and coaching. We promote employee well-being and a supportive team working ethos in line with company values and objectives.

- **2017**: Founded in 2017, with a team of 7 people and £23 million Assets under Management
- **2018**: Opening of Causeway office & Accountancy acquisition of a local firm
- **2019**: Acquisition of another local financial planning firm; Redrock Financial
- **2022**: Organic and acquisition growth, we now have a team of 20 and £120 million Assets under Management
- **2024**: Continued organic growth to 23 people and £135 million Assets under Management
- **2025**: Continued organic growth to 26 people and £178 million Assets under Management

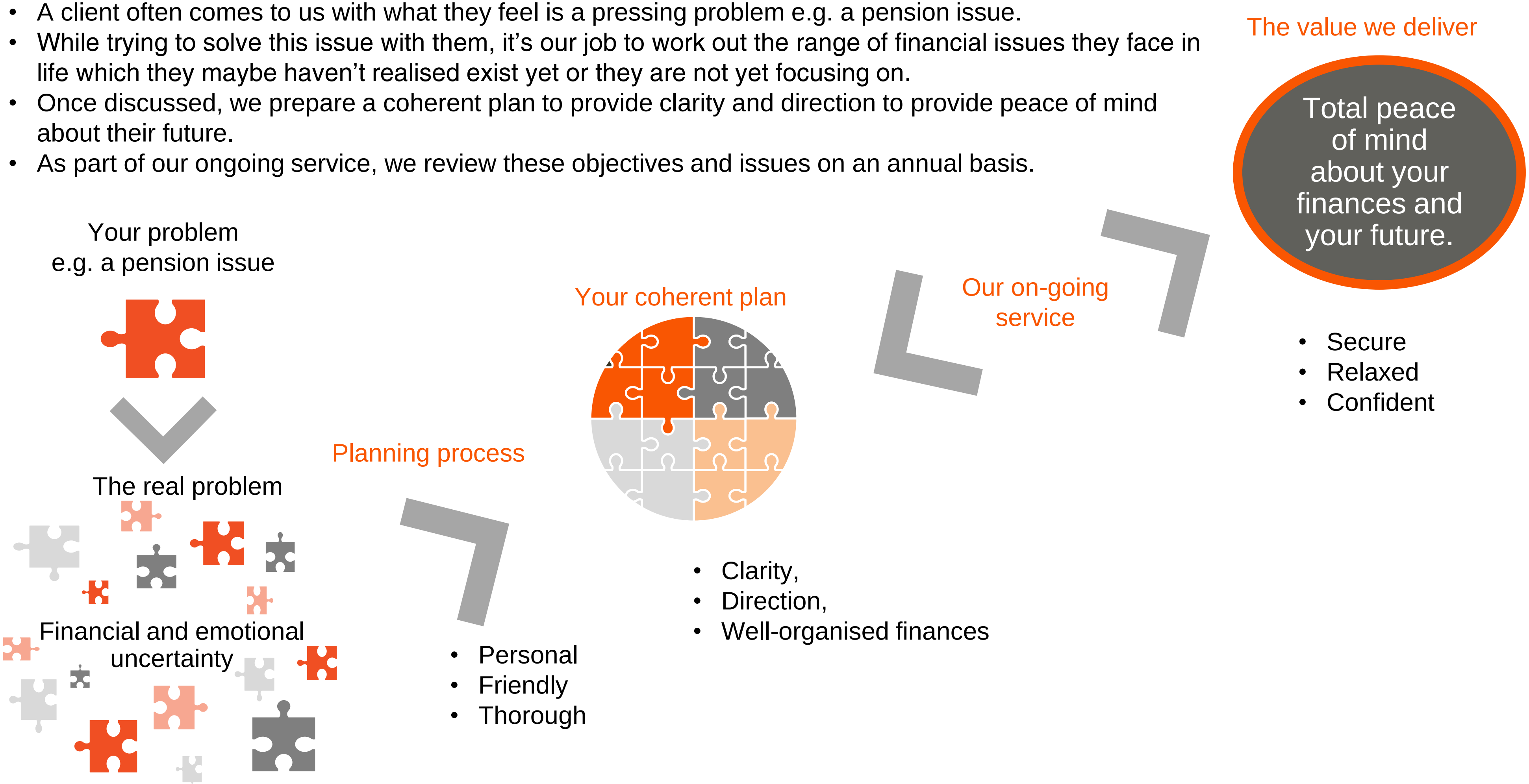
2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025

- Our team has grown from 7 people to 26 people.
- In our Financial Planning business our client Assets under Management have grown from £23 million in 2016, to £178 million at present.
- We have over 500 clients across the firm.
- Pacem won East Belfast's *'Employer of the Year'* award in 2020 & 2022 and the 'Best Wellbeing in the Workplace' award at the Irish News Workplace & Employment Awards 2024.
- 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

Pacem Financial Advisory

- A client often comes to us with what they feel is a pressing problem e.g. a pension issue.
- While trying to solve this issue with them, it’s our job to work out the range of financial issues they face in life which they maybe haven’t realised exist yet or they are not yet focusing on.
- Once discussed, we prepare a coherent plan to provide clarity and direction to provide peace of mind about their future.
- As part of our ongoing service, we review these objectives and issues on an annual basis.



Pacem Financial Advisory

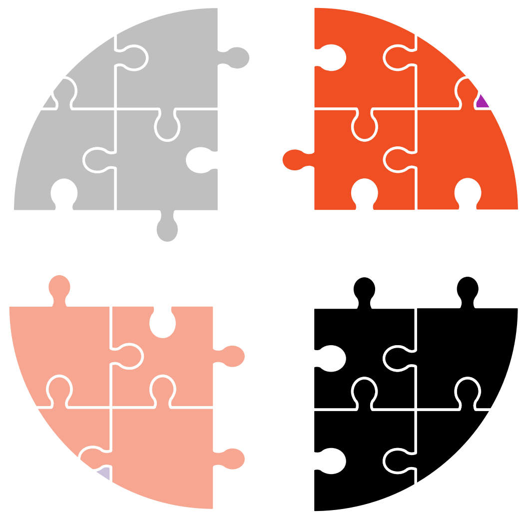
- In each client's plan, there are 4 key areas of financial advisory, as outlined below.

Financial plan

Lifetime cashflow planning:
a) Are your assets sufficient to meet your goals?
b) What choices do you have?
c) What trade-offs will you make?

Contingency plan

Planning for the known unknowns:
a) Long-term care
b) Premature death
c) Illness



Investment plan

Your current portfolio:
a) Suitable?
b) Well structured?
c) Understandable?

Tax plan

Are your affairs tax efficient?*
a) Tax reliefs maximised?
b) Asset location effective?
c) IHT planned for?

* We only work within the common and wholly acceptable tax efficiency planning opportunities afforded by HMRC

Pacem Accounting & Tax Advisory

Pacem also has an Accounting & Tax Advisory service as summarised below:

Accountancy Essentials	***Business Advisory***
Real-time, bespoke, personal and precise... Our book-keeping, compliance and accountancy essentials service provides clients with **clarity, insight and peace of mind.**	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**.
- Cloud Accounting Package - Payroll - Full book-keeping - Year-end accounts - Personal Tax Planning - VAT returns - Monthly Management reporting - Tax Investigation Service	- Cashflow Forecasting and Budgeting - Risk Management - 'What if' Scenario Planning - Professional Tax Advice - Industry Specific Expertise - Succession Planning - Business Valuation - Strategy and growth

Pacem's Core Values

Core Values	
Good to Be Around	**Do things the right way, rather than the easy way**
• Easy to get on with. • Good to be around, even under pressure. • Genuinely care about people, takes time to talk to people.	• 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	**Proud of Pacem and everything that we do individually and collectively**

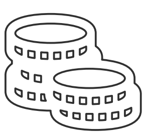
• Will do whatever is required.
• Determination to see things through.
• Initiative & commitment to develop.
• Appetite to learn & take on new challenges.
	• Everything matters; we take pride in:
	    • Our clients – the work they do and our relationships with them
	    • Our team and culture
	    • 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	**Always thinking about the client**
• 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?'	• 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

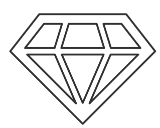
Remuneration

- ✓ 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

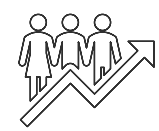


Work / Life & Wellbeing

- ✓ Flexi Time System – Flexible Start/Finish Times
- ✓ Hybrid Working
- ✓ Work well Fridays (Trial)
- ✓ 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



**Eligibility for some of the benefits require successful completion of probation in a permanent role*

Platform & Servicing Specialist

- **Location** - Based at Pacem Advisory Offices, Castlereagh Road, Belfast BT5 6BQ. And included Hybrid working options.
- **Hybrid Working:** Working from home pattern, available after training period.
- **Salary** – Dependent upon Experience
- **Hours** – 36.5 hours per week. (Monday – Thursday 8.30 am – 5 pm & Friday 8.30 am – 1 pm)
- **Reports to** – Group Operations Manager
- **Closing date – Friday 18th April at 12pm.** To apply please send your C.V. and cover letter

  to 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 the best service to our clients and to help continue with the growth of the business.

Benefits

- 20 days holidays increasing by 1 day annually up to a maximum 5 additional days.
- 9 statutory days
- 5 closure days (Taken from employees leave allocation including Christmas closure period)
- Flexi Time Policy (Core working hours and flexible hours)
- Work well Fridays Trial
- 4 Week Sabbatical at 4 Years Service
- Professional Membership Fee payment
- Growing business with opportunities for career progression – option to be supported through Level 4 Financial Planner Qualification if desirable

Pacem Financial Advisory is an Equal Opportunities Employer

The Role

The successful candidate will work with our Advisers and Paraplanning team to help implement professional, efficient and compliant financial planning services to our clients. It is expected that you will be consistently accurate in your work whilst also being efficient, be able to work on your own initiative and maintain the high level of professionalism that our clients expect.

Working within a small team will require you to be hands on in all areas so you will also be expected to answer telephone calls. The ability to communicate in a professional and knowledgeable manner both written and oral will be important.

New Client Onboarding

- Working within our Platform and Servicing Team to support with onboarding new clients and the implementation of their Strategic Financial Plans.
- Taking ownership of the implementation of new business; ensuring it is processed quickly, in a compliant manner, to the firm's standards.
- Check accuracy and completeness of all new business documentation, including any application forms or trust documents.

Product Recommendation for Current Clients

- Submitting new business applications for existing clients and taking responsibility for seeing these through to completion.
- Liaise with product providers to ensure timely and accurate responses to clients.
- Updating client information on relevant systems & ensuring all required documentation has been saved to file.
- Prepare client documentation and correspondence post new business set up as per business processes.

Review and Ad Hoc Actions

- Working with the team to ensure there is a seamless transition of actions post Review meeting from the Planning team.
- Assist with the implementation of any agreed actions in an efficient manner.
- Ensure all ad hoc fund switches / rebalances / top ups / withdrawals are carried out accurately and within company timescales.
- Ensure action points resulting from client meetings get diarised and dealt with in an appropriate timescale.
- Prepare client documentation and correspondence post meetings as per business processes.
- Support the team in client portfolio management and processing on our investment platforms.

Platform Migration

- Support with the set up of Pacem’s own Platform in 2025.
- Migrating all of our client’s assets to the new platform, over a 12 month period.

General Admin

- Manage client databases on our back-office system Intelligent Office.
- Undertake office admin to support team including excel analysis, database updating, file scanning and reception cover if required.
- Create and maintain accurate client records on back-office systems, platforms and any other IT systems Ensure all supporting documentation is maintained as per company procedures.
- Record and reconcile fees.

Essential Requirements

We require the successful candidate to:

- 2+ Years experience working in a similar role within a Financial Services firm.
- Have a strong working knowledge of Microsoft Office packages.
- Have a confident telephone manner and be able to speak directly to external organisations to obtain client and portfolio information. Also, to understand procedures these organisation require Pacem to follow to manage our clients' portfolios and assets effectively.
- Plan and prioritise their own workload and work well as part of our team.
- Have good time management skills.
- Be diligent in their work at all times.
- Have the ability to work and think independently to solve problems as they arise.
- Excellent spoken and written communication, and self-presentation when interacting with clients.
- Strong organisational skills, the ability to plan, prioritise and multitask.
- Be professional, energetic and dependable.
- Attention to detail.
- Ability to work with a high level of confidentiality and sensitivity.

Contact Us

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