



WISE INVESTMENT

PLANNING FOR LIFE

Business Assistant: Temporary Vacancy

An opportunity has arisen for a full-time temporary Business Assistant to join a successful and growing company, initially on a six-month basis.

Wise Investment is an independent, employee owned wealth management and financial planning business. Since the company was founded in 1992, we have provided financial advice and investment management solutions to private clients. Quality and excellence sit at the core of our values. Our team of experienced, qualified investment and financial planning professionals are committed to providing the best service with attractive returns, through the development of long-term relationships with our clients.

We are part of The Oak Investment Partnership which comprises of three subsidiary companies. Ourselves, Wise Investment alongside Wise Funds and Evenlode Investment Management, both of which are fund management businesses.

The Partnership is employee owned and all partners qualify for a profit share scheme after a full year of permanent employment.

Main Responsibilities

We are looking for an articulate and engaging candidate with impeccable interpersonal skills to take on this exciting position in Chipping Norton. The office hours are Monday – Friday 9am-5pm.

This is a full-time position.

- 🌿 Reception duties - meeting and greeting visitors
- 🌿 Managing the switchboard – directing callers appropriately in a helpful and professional manner
- 🌿 Arranging meeting room bookings/catering/general housekeeping
- 🌿 Manage post/courier deliveries
- 🌿 Assisting on health and safety activities such as weekly Fire Safety checks and using the appropriate equipment when needed
- 🌿 Assist the Office Manager and existing Business Assistant with various administrative duties

The above is not an exhaustive list of duties. The role will be developed with the Office Manager and you will be expected to perform different tasks as necessitated by your changing role within the organisation and the overall business objectives.



The Long Barn
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Oxfordshire OX7 5QR

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Wise Investments Limited offers independent investment management and financial planning advice, and is authorised and regulated by the Financial Conduct Authority: FCA no. 230553.
Wise Investment is a trading brand of Wise Investments Limited.

Registered Office: The Long Barn, Chalford Park Barns, Oxford Road, Chipping Norton, Oxfordshire, OX7 5QR. Registered in England 4970458.



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Key Requirements

- 🌿 You ideally have previous experience of working in a similar position and will feel comfortable being the first point of contact for visitors.
- 🌿 You will be well-presented with excellent interpersonal skills plus a calm and professional telephone manner.
- 🌿 You will be able to communicate confidently across all levels and will be a talented team player who is able to muck in with the existing team wherever needed.
- 🌿 You will be confident in your abilities and able to hit the ground running.
- 🌿 You will need excellent IT skills including Advanced Outlook, Word and Excel.

Salary and Benefits

Basic salary	£20,000 dependent on experience
Pension contribution	5% of basic salary. Salary sacrifice available.
Holiday allowance	26 days, plus Christmas week
Working hours	35 hours per week
Probation period	This is a temporary position to start.

Salary and benefits work on a pro-rata basis for part-time Partners.

Offers of employment are reliant on the receipt of satisfactory references and background checks such as adverse credit and DBS (basic).

Please apply by sending your CV and cover letter to HR@wiseinvestment.co.uk

To view this on LinkedIn follow the link below -

<https://www.linkedin.com/jobs/view/619897505/>



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