



new vision

advising financial independence

Job Title: Practice & Business Operations Manager

Purpose of Job: To act as the operational integrator for the business, coordinating people, processes and priorities to ensure the practice operates efficiently and the agreed business plan is successfully delivered. Working closely with the Financial Planning Director, you'll turn strategic ideas into practical action while leading the day-to-day operation of the business.

Salary: £40,000 - £45,000 pa

Reports To: Financial Planning Director

Direct Reports: Operational and client support team (currently including Investment Specialist and Lifestyle Financial Planner, Client Experience Coordinator, Administrator and Operations Assistant)

About Us

At New Vision Financial Planning, we believe financial planning is about far more than money. We are committed to delivering outstanding client service whilst building a business that is organised, efficient and enjoyable to work in.

As our business continues to evolve, we are looking for a Practice Manager to become a key member of our leadership team. This is an exciting opportunity for someone who enjoys bringing structure, clarity and accountability to a growing business, whilst working closely with the Financial Planning Director to turn ideas into action.

The Role

We are looking for someone who enjoys making things happen.

You'll coordinate all operational areas of the business, ensuring the team, systems, suppliers and projects work together effectively to deliver excellent client outcomes. Acting as the central point of coordination, you'll work closely with the Financial Planning Director to turn strategic ideas into practical action while ensuring the business remains organised, efficient and focused on its priorities. You'll be trusted



to make day-to-day operational decisions, coordinate resources, prioritise workload and lead the team, escalating only strategic or business-critical matters to the Financial Planning Director.

You'll be someone who enjoys solving problems, improving processes and helping people succeed.

Key Responsibilities

Business Operations and Coordination

- Coordinate the day-to-day running of all areas of the business.
- Ensure effective communication and collaboration across advisers, administration and external support providers.
- Manage relationships with external providers including compliance consultants, outsourced administration and paraplanning, IT, marketing and other business partners.
- Coordinate business priorities, ensuring work is planned, delegated and delivered effectively.
- Monitor capacity, workflow and operational performance across the practice.
- Act as the central point of coordination for operational matters.
- Produce management information and KPI reporting to support business decisions.
- Drive continuous improvement across people, systems and processes.
- Coordinate and oversee the successful delivery of business activities across all departments, ensuring everyone is working towards shared priorities and objectives.
- Take ownership of the efficient day-to-day operation of the business, ensuring agreed objectives are delivered and operational standards are maintained.

Team Leadership

- Support, motivate and develop the team.
- Conduct regular one-to-ones and performance reviews.
- Assist with recruitment, onboarding and training.
- Help create a positive, collaborative and accountable team culture.
- Manage team capacity, holidays and workload planning.

Business Improvement

- Turn ideas into practical, achievable action plans.
- Coordinate business improvement projects.
- Continually review systems and processes to improve efficiency and client service.
- Help embed consistency and best practice across the business.



- Identify opportunities to improve profitability, efficiency and client experience through continuous operational improvement.

Compliance and Governance

- Coordinate the firm's compliance activities alongside external compliance support.
- Monitor action plans arising from audits and compliance reviews.
- Maintain business registers, policies and operational controls.
- Support the delivery of Consumer Duty and regulatory requirements.

Commercial Support

- Prepare operational reports, KPI dashboards and management information to support informed business decision-making.
- Assist with annual business planning, quarterly objectives and business performance reviews.
- Monitor operational performance against agreed goals, identifying trends, risks and opportunities for improvement.
- Support budgeting, resource planning and operational forecasting.
- Recommend improvements to enhance efficiency, profitability and the overall client experience.
- Support continuous improvement initiatives across the business.

About You

You'll be organised, proactive and confident managing multiple priorities. You'll enjoy creating structure, bringing people together and ensuring plans are followed through.

You'll be confident working alongside an entrepreneurial business owner, helping prioritise opportunities, maintain focus and translate ideas into successful delivery.

Essential

- Strong organisational and planning skills.
- Excellent communication and relationship-building skills.
- Experience leading business operations, coordinating projects and managing teams
- Ability to prioritise competing demands.
- A proactive approach to problem solving.
- High attention to detail.
- Strong IT skills, including Microsoft 365.
- A positive, professional and collaborative approach.



Desirable

- Experience working within a Financial Planning, Wealth Management or other regulated professional services environment.
- Knowledge of Intelliflo Office or similar back-office systems.
- Understanding of FCA regulatory requirements.
- Experience managing or supervising a team.
- Experience implementing business improvements or operational projects.

What We're Looking For

We're looking for someone who enjoys creating order from complexity and takes pride in helping a business operate at its best.

This role would suit someone ready to take the next step in their career or an experienced Practice Manager looking to play an influential role within a growing, forward-thinking financial planning firm.

If you enjoy improving businesses, supporting people and making a real difference every day, we'd love to hear from you.

