

HR FORMS

JOB DESCRIPTION EXECUTIVE OFFICE ASSISTANT

JANUARY 2019



Job title:	Executive Office Assistant	Version date:	1.0
Business area:	Operations	Job family:	Office Services
Reporting to:	Executive Assistant	Salary Range	£19,000 - £21,000 dependent on experience
Full time/ Part Time	Full Time	Contract	No

About Curtis Banks

We are experienced providers of self-invested pension schemes, operating across the UK. Our senior team has been involved with SSASs since 1977 and SIPP's since 1995, giving us almost unrivalled experience in this field. We have dealt with all aspects of these schemes over the years, enabling us to provide a full range of services and bespoke solutions.

We are based in three offices across Bristol, Dundee and Ipswich. This vacancy is for a position at Temple Quay, Bristol just a 5 minute walk from the railway station. The role holder may be expected to travel to other offices from time to time.

The role will report to both the Executive Assistant and the Human Resources Director.

Principal accountabilities:

- Active diary management including organising meetings and associated travel arrangements for members of the Group Management Committee, proactively ensuring that priorities and costs are managed effectively.
- Manage incoming and outgoing mail, both paper and electronic, as requested for the Group Management Committee members ensuring both are dealt with on a timely basis highlighting where high priority action may be needed.
- Proactive production of agenda's & accompanying documentation for Curtis Banks governance meetings as delegated by the Curtis Banks Group Board, ensuring that submissions are on time, correct and complete.
- Supporting the Executive Assistant with production of agenda's & accompanying documentation for Board meetings for Curtis Banks Group, ensuring that submissions are correct and complete.
- Support production of individual papers for governance meetings, Group Management Committee meetings and Board meetings.
- To produce full and accurate minutes, in a timely manner, for governance meetings, Group Management Committee meetings and if required, Board meetings.
- Requirement to work closely with Executive Office Assistant and Executive Assistant to ensure satisfactory support to the Group Management Committee included, but not limited to: all staff survey, all staff presentations, CEO coffee mornings, all staff comms.

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- Maintain and develop contact with internal and external customers to ensure accurate communication of information and understanding.
- Understand and demonstrate compliance with the company's policy on treating customers fairly (TCF).

Qualifications

- 5 GCSE's (or equivalent) at grades A-C (or equivalent) to include English and Maths (essential)
- A-level/related equivalent qualification is desirable.

Knowledge

- Solid understanding of Microsoft applications (essential)
- Understanding of effective minute taking
- Previous experience of working in an Executive Office (desirable)
- Previous experience of working in a Financial Services environment (desirable)

Skills

- Strong interpersonal skills in order to build productive relationships and to communicate effectively both verbally and written.
- Excellent organisational skills. Ability to plan own and other's workload to meet business requirements and tight deadlines (essential)
- Trustworthy and honest ensuring the utmost confidentiality is maintained at all times.
- Ability to identify and drive forward Executive Office service enhancements.
- Ability to work effectively in a team and also to work on own initiative.