

HR FORMS

JOB DESCRIPTION

2019



Job title:	New Business Administrator	Version date:	1.0
Business area:	New Business & Cash Management	Job family:	Customer Services
Reporting to:	New Business Team Leader	Approved role?	Y
Job holder:	N/A	Code staff?	N/A

Purpose

- New Business Administrators provide an important role in the administration of our SIPPs, supporting all areas of the business.
- There are a range of important tasks in the operation of SIPPs which Administrators can handle, which include the ongoing and day to day administration of new business applications and transfers in.
- New Business Administrators generally focus on one of the two primary areas of New Business; Transfers In or New SIPP Applications and general servicing. This enables the administrator to develop skills and expertise on specific processes.
- All New Business Administrators should ultimately aspire to be able to carry out tasks in both areas of the team.

Principal accountabilities:

- Processing of client instructions accurately and to the service standards set by the Company, at all times maintaining confidentiality and demonstrating discretion.
- Building good relationships with clients and business introducers.
- Where relevant and appropriate, informing Account Managers, clients and financial intermediaries of specific matters or issues affecting their schemes and benefits relevant to each scheme especially actual or potential problems.
- Ensuring that client deadlines, all internally agreed key performance indicators, service standards and regulatory reporting requirements are met.
- To fulfil any other reasonable requirement of the department or Curtis Banks Ltd
- Proactively identifies risk within the department and escalates concerns to Team Leader.

CONTINUED

Qualifications

- N/A

Knowledge

- Demonstrates a full operating knowledge of the key administration and support software that is central to the role within the business. Able to cross train new starters to our internal procedures and methods.
- Demonstrates knowledge of our commercial market place and where the Company sits within it.

Skills and Experience

- A sound and proven experience within the field of Pension administration.
- Fully understands the data conformance needs of each system and where key data is mastered. Able to demonstrate exceptional information security control.
- Able to demonstrate the ability to identify data anomalies and issues and correct them at source or seek guidance as appropriate.

Declaration

It is a requirement of Curtis Banks that its employees are aware of and conform to legal requirements in all activities, both internal and external. Implicit in this is that all managers and staff not only conform to the appropriate standards in terms of Health and Safety, but also work to the highest standards of business ethics.

- I acknowledge that I have read and understood the above Job Description.

Signature & Agreement:			
Employee signature:		Date:	
Manager signature:		Date:	