

Junior Investment Analyst

Curtis Banks are looking for a Junior Investment Analyst to join our Technical Investments Department within our Bristol office to provide a professional and effective administration service for the Company.

The Junior Investment Analysts provide an important role in the administration of our SIPPs. There are a range of important tasks in the operation of SIPPs which Junior Investment Analysts handle. They act as a point of contact on certain technical investment issues and are responsible for providing a quality service to our clients in respect of monitoring the activity of investments and investment counterparties (including claims, compensation, periodic reviews), approvals of new investments (including in-specie) and disposals along with Investment Management Agreements. The Junior Investment Analysts also is a fundamental support function of the Technical Investment Analysts and Management.

The position and duties will include;

- Processing of clients instructions and any task activity accurately and to the service standards set by the Company, at all times maintaining confidentiality and demonstrating discretion with clients and business introducers.
- Providing input on technical issues
- Building good relationships with clients and business introducers
- The investigation, research and monitoring of investments held within the Curtis Banks asset register in order to identify areas and instances of risk
- The development and continual improvement of processes and monitoring activity of investments and investment counterparties
- The complete and accurate record keeping of all activity
- Where relevant and appropriate, informing internal departments, clients and financial intermediaries of specific matters or issues affecting their schemes and investments, 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
- Proactively identifies risk within the department and escalates concerns to Team Manager

A full job description is available on request.

This is a full time vacancy

Office hours are: 9.00am - 5.30pm Monday to Thursday & 9.00am - 5.00pm Friday (37 hours)

Start date: Immediately

Duration: Permanent

Location: Bristol

All candidates will be asked to confirm their eligibility to work in the UK at interview stage and to provide evidence of it on appointment. Please note that successful candidates will be subject to a criminal records and personal credit check.

How to apply: Please send your CV, along with a brief covering email to – recruit@curtisbanks.co.uk