

JOB SUMMARY - KEY ACCOUNT MANAGER

Account Managers provide an essential role in the administration of our SIPP's. They are responsible for handling the clients and financial advisers which have been assigned to them in all aspects of SIPP operation. They are the front line in the firms SIPP offering and represent the company in Key Account relationships. As the main point of contact for allocated relationships, Account Managers are expected to work with the functional areas of the business to ensure all instructions are carried out effectively.

Account Managers are required to act pragmatically and may be required to carry out some administrative support tasks, purely to satisfy the requirements of the Key Account. Key Account Managers are expected to hold a thorough knowledge and understanding of the SIPP lifecycle.

Principal Accountabilities:

- To possess an excellent working knowledge of the Curtis Banks products, the fee structure, key features and terms and conditions.
- Overseeing instructions and ensuring that any task activity is accurately completed to the service standards set by the Company, at all times maintaining confidentiality and demonstrating discretion.
- Providing input on technical issues.
- Building and maintaining good relationships with clients and advisers.
- Where relevant and appropriate, informing clients and financial intermediaries of specific matters or issues affecting their schemes, 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 Department Manager.

Knowledge, skills and experience required:

- Possesses a good working knowledge of self administered pension schemes.
- Demonstrates a good understanding of the key administration and support software that is central to the role within the business.
- 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.
- Demonstrates an understanding of our commercial market place and where the Company sits within it.
- Demonstrates excellent telephone and written communication skills.

A full job description is available on request.

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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