

New Business & Servicing Administrator

We are looking for an Administrator to join our Curtis Banks New Business Department within our Bristol office to provide a professional and effective administration service for the Company.

As a New Business & Servicing Administrator, you will be required to carry out an important role in the administration of our SIPPs, supporting Account Managers and Senior Management. 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.

The position and duties will include;

- Processing of clients 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.

Person Specification: The candidate must be able to demonstrate data entry experience; pension experience is desirable but not essential as training will be provided. They should have the passion for excellence and willingness to drive a process of continual improvement. The candidate must also demonstrate good interpersonal communication skills and working knowledge of industry standard software e.g. Microsoft word, excel, outlook etc. The position requires a good standard of literacy and numeracy and excellent attention to detail.

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 (37.5 hours)

Start date: Immediately

Duration: Permanent

Salary: Competitive

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 – HR@curtisbanks.co.uk