

## HR FORMS

# JOB DESCRIPTION

2019



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

### Purpose

- Benefits Administrators provide 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 calculation and administration of the benefits that are provided by SIPPs.

### Principal accountabilities:

- 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.
- 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 Plc
- Proactively identifies risk within the department and escalates concerns to Team Leader.

### Qualifications

- N/A

# CONTINUED

## Knowledge

- Demonstrates knowledge of our commercial market place and where the Company sits within it.

## Skills and Experience

- A sound and proven experience within pension benefits 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:	