

HR FORMS

JOB DESCRIPTION

2019



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

Purpose

- Handling the ongoing and day to day administration of new scheme applications, transfers in & out, asset purchases and sales (including loan backs), benefit payments and technical queries.

Principal accountabilities:

- To possess a good working knowledge of the Curtis Banks SSAS; the product, the pooled asset structure, the fee structure, key features and terms and conditions.
- To process client & IFA instructions and other task activities accurately and to the service standards which are set by the Company and at all times maintaining confidentiality and demonstrating discretion.
- Providing input on technical issues and meeting with clients and IFA's when required.
- Establishing and building on good working relationships with our clients and our introducers.
- Where relevant and appropriate, informing clients and financial intermediaries of specific matters or issues which might affect their schemes, including actual or potential problems.
- Ensuring that client & adviser deadlines, all internally agreed key performance indicators, service standards and regulatory reporting requirements are met.
- To fulfil any other reasonable request or requirement from another department or area within Curtis Banks.
- To proactively identify risks within the Department and to escalate any such concerns to the Department Manager.

CONTINUED

Qualifications

- N/A

Knowledge

- A good working knowledge of self-administered pension schemes (SSAS or SIPP).

Skills and Experience

- 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.

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:	