

INVESTMENT OPERATIONS TEAM LEADER

BRISTOL

2019



The Role

At Curtis Banks, we believe that a business can only be as successful as the people who work for it. Our commitment to encourage employees to take responsibility for their career, encouraging them and offering opportunities for advancement, is an integral part of our business strategy.

The role of the Team Leader is to ensure the smooth running of administration teams ensuring SLAs are met, and quality is maintained across the department.

The Team Leader must demonstrate effective prioritising of actions and monitoring of team resources to ensure that client deadlines are met. The Team Leader will develop staff in their team, conduct performance appraisals for the team, identify weaknesses and deliver coaching and mentoring in areas which may require improvement.

As a Team Leader, the purpose of the role is to support the Investment Director with:

- Ensuring that the required systems and controls are embedded within the department,
- Delivering continual improvement within the department across the areas of staff development, process conformance, process efficiency, productivity and management information. Tenacious progression of staff performance issues.
- Ensuring that all department staff are fully trained and conversant with the key administration and support software that is necessary to their role.
- Acting on identified errors to ensure that the appropriate measures are taken to eliminate reoccurrence.
- Ensuring that staff adhere to all Curtis Banks policies and business requirements.
- Ensuring that the department has the required succession planning through knowledge dissemination and skill development.

You will

- Manage a workflow of tasks created by clients, advisers or internal departments within SLA
- Coordinate the team and liaising with other parts of the business to ensure punctual allocation and processing of daily payments
- Oversee and maintain ownership of proactive daily investment sweeps
- Monitor and regulate communications received in team from clients, advisers and third parties via email, post and secure message
- Have oversight of internal procedures and associated process guides, and update these where necessary
- Liaise with third party investment providers to implement and communicate operational changes
- Collaborate with Investment Director to streamline processes and procedures
- Take ownership of and resolve complaints / errors

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- Lead by example: give good advice, provide all necessary support to staff, encourage ownership of work, challenge staff to seek continual improvement, be open and honest at all times, share information across the business, respect and value the contribution of others, exemplary attendance record, promote corporate values and ensure own personal actions are in line with corporate objectives and culture.
- Obtain overall responsibility for administrators and Senior administrators 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.
- Act as the escalation point for all technical issues.
- Attend clients meetings as and when required and leading these interactions. Acting always as an ambassador for the Company.
- Build good relationships with clients and business introducers.
- Where relevant and appropriate, inform senior management team of specific matters or issues within the department and or risks which could potentially impact on clients or investments.
- Ensure teams adhere to client deadlines, all internally agreed key performance indicators, service standards and regulatory reporting requirements are met.
- Fulfil any other reasonable requirement of the department or Curtis Banks Plc
- Support the Investments Director to proactively identify, record, mitigate and escalate identified risk in conformance with company processes and procedures.

Skills and Experience

- A sound and proven experience within the field of Pension administration or dealings.
- 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.
- Strong excel skills, in particular data matching and formulas.

Working for Curtis Banks has never been so rewarding...

- Everyone receives a generous salary, 26 days holidays and the opportunity to take part in our fantastic Sharesave Scheme.
- Amazing Pension contributions from the business of 8%
- Benefits scheme that includes discounts from shops, gyms etc.
- Cycle to Work scheme and many more...