

KEY ACCOUNT MANAGER

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. As a Key Account Manager, you will:

- Be responsible for handling the clients and financial advisers which have been assigned to them in all aspects of SIPP operation.
- Be the front line in the firms SIPP offering and represent the company in Key Account relationships.
- Be 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.
- Act pragmatically and carry out administrative support tasks, purely to satisfy the requirements of the Key Account.

You will

- Possess an excellent working knowledge of the Curtis Banks products, the fee structure, key features and terms and conditions.
- Oversee 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.
- Provide input on technical issues.
- Build and maintaining good relationships with clients and advisers.
- Where relevant and appropriate, inform clients and financial intermediaries of specific matters or issues affecting their schemes, especially actual or potential problems.
- Ensure that 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 Ltd.
- Proactively identifies risk within the department and escalates concerns to Department Manager.

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.
- Demonstrates excellent telephone and written communication skills.
- Possesses a good working knowledge of self-administered pension schemes.

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- To hold a thorough knowledge and understanding of the SIPP lifecycle.

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...