

# JUNIOR INVESTMENT ANALYST - 6 MONTH FTC 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 Junior Investment Analysts provide an important role in the administration of our SIPPs.
- There are a range of important tasks in the operation of SIPPs which Junior Investment Analysts handle.
- They act as a point of contact on certain technical investment issues and are responsible for providing a quality service to our clients in respect of monitoring the activity of investments and investment counterparties (including claims, compensation, periodic reviews), approvals of new investments (including in-specie) and disposals along with Investment Management Agreements.
- The Junior Investment Analysts also is a fundamental support function of the Technical Investment Analysts and Management.

## You will

- Process of client's instructions and any task activity accurately and to the service standards set by the Company, at all times maintaining confidentiality and demonstrating discretion with clients and business introducers.
- Provide input on technical issues
- Build good relationships with clients and business introducers.
- Investigate, research and monitor investments held within the Curtis Banks asset register in order to identify areas and instances of risk.
- Develop and continually improve processes and monitoring activity of investments and investment counterparties.
- The complete and accurate record keeping of all activity
- Where relevant and appropriate, inform internal departments, clients and financial intermediaries of specific matters or issues affecting their schemes and investments, 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
- Proactively identify risk within the department and escalates concerns to Team Manager.

## Skills and Experience

- A sound and proven experience within pension benefits administration.

## CONTINUED

- Demonstrates a full operating knowledge of the key administration and support software that is central to the role within the business.
- 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.
- Demonstrates knowledge of our commercial market place and where the Company sits within it.

### **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...