

JUNIOR TPA CLIENT MANAGER

BRISTOL

2019



The Role

We are a leading provider and administrator of self-invested personal pensions (SIPPs), part of Curtis Banks Ltd, based at Temple Quay, Bristol just a 5 minute walk from the railway station. Our employees are a mix of all ages and there is a vibrant, fun culture that extends outside the workplace.

We offer a fantastic benefits package, including a generous pension scheme, flexible working, study support to help develop your qualifications and early close on Fridays to name but a few. For more details about us visit Curtisbanks.co.uk or find us on LinkedIn and Facebook.

Junior TPA Client Managers are expected to act in accordance with the relevant frameworks and processes and adhere to the contractual Service Level Agreements. They are the internal and external points of contact and liaise with other departments within Curtis Banks to ensure that any work carried out by the functional/support teams meets the required standard.

Junior TPA Client Managers are responsible for assisting the TPA Client Managers in ensuring all agreed reports and contractual documents are completed and submitted in line with agreed standards and timescales. They are expected, with the help of structured and on-the-job training, to obtain new skills and to gain further knowledge in order to meet the needs of the role, the relationship and wider business more effectively.

You will

- Be responsible for helping to co-ordinate and provide business analysis for any projects that are linked to the third party contract.
- Build a good working relationship with relevant external key contacts.
- Assist in gathering data for the monthly MI reporting, including liaison with relevant areas within Curtis Banks to obtain the required data sets within agreed timeframes.
- Have a good understanding of the contracts in place and ensuring we are in keeping with the contract at all times. Assisting with periodic reviews of the contract and reporting to the business as appropriate. Overseeing contract changes and implementation of associated terms within the business.
- Assist in completing all pre and post meeting requirements, including preparation and write up.
- Ensuring that agreed deadlines, all internal and externally agreed performance indicators, service standards and regulatory reporting requirements for the relationship are met.
- Assist with ad-hoc information and business requests through liaison with relevant business areas, Senior Management and Compliance departments.
- Help to present key and pertinent information and proposals to senior management for decision making and feedback. Will liaise with operational areas to implement processes and communicate updates relating to the contract.
- Assist TPA Client Managers in overseeing and implementing changes by us or the third parties.

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- Deal effectively with all correspondence, by telephone, email and letter.
- Be available to assist all TPA Client Managers as necessary to ensure workload targets are met across the department.
- Work conscientiously to ensure that all work is carried out to a high standard and being flexible to accommodate change.
- Attend ad-hoc and regularly scheduled business meetings as and when required and acting always as an ambassador for the Company.
- Where relevant and appropriate, informing management team of specific matters or issues within the department and or risks which could potentially impact on the business.
- Reporting to line manager where internally agreed key performance indicators, service standards and regulatory reporting requirements are met.
- Assist TPA Client Managers to ensure EOD and Formal Complaint cases are managed and escalated appropriately, deferring to department head where necessary and liaising with firms Complaints department.
- Support TPA Client Managers to proactively identify, record, mitigate and escalate identified risk in conformance with company processes and procedures.
- To fulfil any other reasonable requirement of the department or Curtis Banks Ltd.

Skills and Experience

- A sound and proven experience within pensions 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.

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

- Everyone receives a generous salary, 26 days holiday 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...