

INVESTMENT ANALYST

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 an Investment Analyst, you will:

- Provide an important role in the administration of our SIPPs.
- Be involved in a range of important tasks in the operation of SIPPs that Investment Analysts handle.
- Have responsibility for the day to day investigation, research and monitoring activity of investments and investment counterparties.

You will

- 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 monitor activity of investments and investment counterparties.
- Complete accurate record keeping of all activity.
- Ensuring that deadlines, all internally agreed key performance indicators, service standards and regulatory reporting requirements are met.
- Process any task activity accurately and to the requirements set by the Company, at all times maintaining confidentiality and demonstrating discretion with clients and business introducers.
- Where relevant and appropriate, inform Account Managers, clients and financial intermediaries of specific matters or issues or potential problems affecting their schemes.
- Fulfil any other reasonable requirement of the department or Curtis Banks
- Proactively identify risk within the department and escalates concerns to Team Leader.

Skills and Experience

- A sound and proven experience within pension benefits administration.
- Demonstrate a full operating knowledge of the key administration and support software that is central to the role within the business.
- Ability to cross train new starters to our internal procedures and methods.
- Fully understand the data conformance needs of each system and where key data is mastered.
- Ability to demonstrate exceptional information security control.
- Demonstrate the ability to identify data anomalies and issues and correct them at source or seek guidance as appropriate.
- Demonstrate knowledge of our commercial market place and where the Company sits within it.

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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...