

PROPERTY ADMINISTRATOR

(JUNIOR SSAS PROPERTY EXECUTIVE PATHWAY)

About Curtis Banks

Curtis Banks is a leading provider and administrator of self-invested personal pensions (SIPPS). Founded in 2009, Curtis banks now have over 600 employees in 3 locations. We aim to ‘lead the way’ in self-invested pensions for the modern world of retirement.

We are proud to say we are a ‘living wage’ employer, joining 9,000 other organisations across the UK who voluntarily chose to pay the real living wage, which is higher than the government national minimum or national living wage.

Job title:	Property Administrator (Junior SSAS Property Executive pathway)	Closing date:	27 September 2023
Full/Part Time:	Full Time	Salary range:	Depending on experience
Business area:	Property Department	Job family:	Customer Service/Legal
Reporting to:	SSAS Property Team Manager	Location	Ipswich

Why chose this role?

This role is specifically tailored to support the progression of individuals looking to kick start their careers and have a clear pathway to grow within our organisation.

Working with us will provide you with a unique and engaging blend of administrative, financial, and legal exposure with opportunities to progress and develop in all of these disciplines.

To support you journey with us, we provide full training programs to upskill you in all of the previously reference areas as well as funded qualifications to ensure you have the tools and experience you need to be successful in your new role and beyond.

In addition, we offer other great benefits including a generous pension scheme of up to 15%, life assurance, group income protection, performance related yearly bonuses, share save scheme, buy and sell holiday scheme, paid overtime and discounts at a huge range of high street stores. We also offer 22 days holiday, which increases through length of service.

What would you be doing?

- Manage a technical transactional caseload of SSAS and SIPP commercial property matters including but not limited to disposals, lease and building works as well as all aspects of day-to-day property management such as loan repayments, credit control and general tenant enquiries
- Prioritise own workload to ensure that quality work is delivered on time and efficiently
- Revising, analysing and interpreting legal documents, identifying risk & liability that falls outside of company standards and identify and implement solutions to mitigate risk
- Assist in analysing complex legal conveyancing / transactional matters, including their impact on pensions legislation, legal issues, identifying legal problems and supporting colleagues, superiors and business wide projects in identifying solutions to the same
- Conducting client meetings and contributing to technical presentations / seminars to external parties and professionals on various aspects of pension transactions, ongoing management and pension regulations
- Ensuring contractual and financial liabilities of CB are identified, understood and effectively managed in line with regulatory and legal requirements.
- Use technical and legal knowledge in conjunction with analytical skills to:
 - Assess new property enquiries against company risk appetite and regulatory requirements
 - Undertake both purchase and sale transactions, ensuring all risks are understood, mitigated, and if appropriate, relayed to clients
 - Investigate and support the team as well as communicate, propose solutions and escalate where necessary to appropriate key stakeholders to agree resolutions and make recommendations to prevent future reoccurrence
 - Assist in implementation of improvements to current working practices within the team that contribute to long term operational excellence and improvements in controls.
- Understanding and adhere to all relevant controls such as internal risk controls, data protection, money laundering and ensure compliance of all regulatory, business and legal requirements.

Qualifications

- To consistently promote and adhere to Consumer Duty regulations
- GCSE's at grades A-C (or equivalent) in both English and Maths
- Commercial Property Paralegal qualification (desired)
- Certificate in Financial Planning level 1 (desired)
- Certificate in Financial Administration FA2 (desired)

Skills / Knowledge

For us - drive is the main thing, but experience in administration, finance or law would be desired. If you don't have this experience, we want to see a great work ethic, a willingness to learn and the desire to progress within our organization.

- Able to communicate effectively both verbally and written
 - Good people and interpersonal skills to build up effective relationships at all levels internally and externally
 - Ability to prioritise own workload to ensure that quality work is delivered on time and efficiently
 - Ability to understand the needs of our customers and be focused around customer outcomes balancing this with risk to the Curtis Banks Group corporate entities
 - Excellent organisational skills and ability to remain calm under pressure in order to meet contractual deadlines
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Consumer Duty

The FCA requires that “a firm must act to deliver good outcomes for retail customers”. At Curtis Banks we act in good faith and avoid foreseeable harm toward our retail customers. We enable and support our customers to pursue their financial objectives.

We ensure our products and services are fit for purpose. We ensure the price & value is fair. We equip our customers to make effective decisions through our clear communications. We provide a helpful customer service that is responsive and accessible.

You play an important part in helping us deliver good outcomes to our customers by:

- Ensuring that you fully understand what Consumer Duty is and how it applies to your role at Curtis Banks
 - Complying with Consumer Duty in all circumstances
 - Always acting to deliver good outcomes for all of our customers
 - Always doing your utmost to avoid foreseeable harm and safeguard vulnerable customers
Demonstrating how you meet good customer outcomes
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