

## Current vacancies – January 2010

### Client Relationship Administrator

#### Personal Attributes

- + Relevant experience in financial services
- + Self motivated
- + A good team player
- + High personal standards
- + A desire to enjoy work.

#### Mission Statement:

To maintain, as appropriate, procedures and systems for the timely and efficient processing and recording of

- + New business
- + Periodic valuation statements
- + Customer queries
- + IFA queries

To maintain an appropriate record keeping system to meet commercial and regulatory requirements, in particular so that the Company can identify that it is treating its customers fairly

#### Key responsibilities:

To check and process new applications received and resolve outstanding queries;  
To carry out appropriate verification of identity checks;  
To monitor all ISA transfers in liaison with distributors and other ISA managers;  
To maintain appropriate records of new business and pending cases;  
To maintain procedures for, and records of, the issue of periodic valuation statements;  
To deal with queries from distributors and customers in a timely and efficient manner;  
To produce such MI as may be required on a regular and ad hoc basis

#### Contract Terms:

This position is currently offered on a limited fixed term contract of 3 months. This may be extended for a further term or to a permanent contract at our discretion, depending on requirements.

Salary commensurate with experience.