

Current vacancies – January 2010

New Business 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 pended 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.