

## **Role Title – Life and Pensions Administrator**

### **Core Role Objective**

Reporting to the Client Service Lead, the Life and Pensions Administrator plays a critical role in maintaining service standards and is responsible for providing high-quality administrative and client servicing support to a team of Advisors. The candidate will ensure that life and pension cases are processed accurately, efficiently, and issued in a timely manner while ensuring compliance with regulatory requirements.

### **Key Responsibilities**

- Maintaining accurate and up to date records, logs and tasks on internal trackers and CRM platforms to ensure pipeline is managed effectively and progressing all new business in a timely fashion.
- Prepare client meeting documentation (Applications, SOS's etc.)
- Attend meetings in a support role to the consultants.
- Assist the financial advisors in market research for new business cases, comparing the market for the most competitive product pricing, and providing transparency to customers regarding all costs and charges associated with their policies.
- Manage the processing of new business applications in Pension, Investments and Life assurance and deal directly with the life companies to ensure these are processed in an accurate and timely manner.
- Communicate with clients over phone and email keeping them updated on the progress of their applications.
- Working with the Advisor team to ensure that all investment related information provided to clients is accurate and up to date.
- Attend weekly team meetings to discuss ongoing and new cases, troubleshoot potential problems and pick up potential solutions with colleagues.
- Fulfil all compliance obligations on new business cases (e.g. preparation of client recommendations and associated compliance paperwork in line with Central Bank requirements).
- Adhere to business processes / procedures and use of mandated third party software solutions.

### **Skills and Qualifications**

- 1 to 5 years' experience (preferably having worked in brokerage)
- QFA qualified or working toward
- Compliant with CPD requirements & complete required CPD hours each calendar year. These hours must be relevant to the specific function.
- Good understanding of how to use the provider broker portals
- High level of attention to detail
- Good interpersonal skills and a team player
- Proven track record of delivering excellence in customer service
- Excellent organisational skills and ability to work on your own initiative
- Ability to manage your own time efficiently and effectively
- Ability to problem solve and follow queries through to a satisfactory conclusion



- Willingness to develop technical knowledge and skills and desire to undertake appropriate study
- Motivation to develop within the organisation
- Proficiency in Word, Excel and PowerPoint

*This job description is not meant to be definitive and may be amended to meet the changing needs of the Company.*