Client Services Senior Administrator - Pensions

Department: Client Services - Pensions

Reports to: Client Service Administration Team Leader

Business/Function: Novia Financial

Main Location: Cambridge House, Henry Street, Bath

Job Summary/Purpose:

The role is a core function within Client Services Administration. Customer care must be proactively considered; emphasis placed on provision of service excellence and value to our clients, ensuring work is right first time, every time. The central responsibilities include:

- Customer Relations - deal with queries and requests from Financial Advisers, administrators, paraplanners and on occasions their clients
- Pensions Administration - involved in the accumulation and decumulation lifecycle of a pension plan, this involves the Novia SIPP and Drawdown wrapper as well as the Novia Group SIPP
- Workflow management – ensuring that the work is distributed between the team and is completed within the agreed timeframes

Key point of escalation for queries and issues relating to the business processes

Core Responsibilities

- Continually focus on delivery of excellent customer service to ensure that the Company is highly valued by our clients
- To manage and distribute team member workloads to ensure that distribution of work is appropriately split, depending on available resource across the area and/or team
- With support from the Team Leader, ensure that new procedures are implemented and trained out to team members following new regulation laws and/or changes to procedure as required by management
- Accountable for the accuracy and completeness of business processing through the use of checklists and quality control spot checks
- Checking and authorising the work prepared by other administrators, highlighting areas for development and coaching less experienced colleagues to develop their experience and expertise
- Ensure all work items are processed within the relevant internal Service Level Agreements (SLA)
- Develop, implement and consistently review processes and their respective procedure guides and checklists
- To follow Risk & Compliance procedures by logging breaches, incidents and complaints
- Taking ownership of more complex cases such as those for directors, other members with special benefits and cases where 'surgery' is required
- Meet all Financial Conduct Authority regulations
- Achieve and actively maintain your skills and knowledge to adhere to the Training and Competence standards
- Ensure that the Treating Customers Fairly principles are adhered to, including raising any areas for concern with either line manager or compliance
- Manage risk effectively by informing line manager if any incidents, “near misses” or exposures to our risk profile are identified. Report risk concerns to line manager
- Responsible and accountable for own personal development i.e. prepare and actively operate personal training/development plans
- Focus on developing, implementing and sharing best practices
- Recognise the importance of working together as a team to maximise team, department and company results
- Understand the wrap platform market and how changes in the market affect our business model

You will, from time to time, be required to undertake other activities that fall within your capabilities as directed by management.

Client Services Senior Administrator - Pensions

Core Competencies

- **Business Focus**
  The motivation and ability to apply good financial practice and company procedures at all times
- **Operational Excellence**
  Continually delivering and improving excellence for clients and customers
- **Client and Customer Focus**
  Add value to client/customer, adhere to Treating Customers Fairly principles, and operate as a true business partner
- **Communication**
  Communicate clearly and concisely, tailoring content and style, with ability to make a positive impression on others
- **Expert Knowledge**
  Consistent application of professional or specialist knowledge and skills; takes opportunities to contribute to policy and best practice
- **Working With Others**
  Working successfully with others and building a network of good relationships, internally and externally, in order to achieve shared goals
- **Performance Focus**
  Demonstrate energy and enthusiasm, takes ownership, delivers results and improves personal performance

Main Contacts

- The Client Services Administration, Front Office, Investment Administration and Business Support Teams
- The Management Team
- Third Party Contacts

Authority Levels and Decision Making

- Allocation of tasks

Specialist Skills, Qualifications and Experience

Essential:

- SIPP knowledge and Pensions administration experience
- Drawdown knowledge and experience
- Understand Benefit Crystallisation Events and PCLS payments
- Good academic record
- PC literate, specifically Outlook and Excel
- Good attention to detail
- Excellent interpersonal and communication skills
- Ability to work well individually and as part of a team
- Ability to work well under pressure, and to tight deadlines

Desirable:

- Have wrap platform knowledge and/or experience
- Have Financial Services qualifications (E.g. IOC or CII)
- Understand how Model Portfolios can be used on a platform
- Pension payroll administration experience
- Pension review administration experience

To apply for this role, please email an up-to-date CV to jobs@novia-financial.co.uk.

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