

Job Description

Job Title:	Senior Private Client Administrator
Location:	Jersey
Hours:	35 hours per week
Employment Status:	Entitled / Entitled for Work

Purpose of Role:

To provide comprehensive secretarial/administrative support and assistance to our team of Consultants.

Main Responsibilities:

- Drafting and issuing correspondence in the form of letters and emails to internal and external clients, maintaining diary systems and answering telephone calls.
- Training junior staff members on the policies and procedures of the team.
- Filing, processing, collating and forwarding documentation and monitoring and diarising return.
- Accurately updating and maintaining the client information systems in a timely manner.
- Organising appointments and meetings for Consultants and Clients, ensuring appropriate co-ordination and timing. Preparing and printing the necessary literature, brochures and packs for all face-to-face and telephone meetings.
- Help establish and maintain effective relationships with clients in a professional but friendly manner, and help ensure any queries are handled efficiently through to conclusion.
- Adhering to Compliance Procedures by making files compliant before new business cases are processed.
- Liaise with employers, pension members, pension providers, trustees, insurance companies and financial advisors.
- Administration of Pension Claim Forms.
- Processing Leavers from the Group Pension Schemes.
- Process letters of Authority from financial advisers/third parties to providers.
- Other ad hoc duties as requested by the Line Manager and/or Directors.

Person Specification	Essential	Desirable
Knowledge and Experience		
Experience in working in a regulated Financial Services Business	✓	
Relevant Qualifications		✓
Proficient use of Outlook, Excel and Word	✓	
High standards and attention to detail	✓	
Skills		
Excellent communication skills	✓	
Excellent interpersonal skills	✓	
Good client service skills	✓	
Attributes		
Ability to work on own initiative	✓	
Ability to manage own time	✓	
Ability to prioritise workloads effectively	✓	
Other		
Jersey Resident for at least 5 years	✓	

Rossborough Financial will provide full training on all aspects of the role, including our client database and document management systems, together with our processes and procedures for managing time-critical financial transactions.

Relevant qualifications are encouraged and will be supported in line with our internal procedures.

To apply please send a copy of your CV to Scarlett Warner at swarner1@rfsi.co.uk