

Senior Trust and Company Administrator

- To deal accurately with all issues and administration related tasks for a portfolio containing some complex client structures, receiving and handling efficiently all communications, ensuring all matters arising are fully and efficiently dealt whilst providing a high standard of service.
- To provide trust and company administration services, including progressive client contact in a professional manner and in accordance with regulatory requirements, service levels and company standards so as to meet client expectations.
- To administer an allocated caseload of more medium and high risk clients, competently and autonomously with limited support of other team members.
- If appropriate, responsibility for the training and development of junior administrators

Key Duties and Responsibilities

- Administration of a portfolio of trust and companies, some of which will be complex and seeking guidance or verification where necessary. Assist with a range of day to day administrative tasks within the department.
- Responsibility, in liaison with a director, for building and maintaining successful relationships with clients within portfolio. Regular contact with clients, principally by letter, e-mail and telephone and providing a quality and professional service.
- Liaising with external advisors including investment advisers, asset managers, lawyers, accountants, brokers, tax advisers, auditors and other third parties, as necessary regarding client affairs
- Assisting with and ensuring that all client requests/documentations are completed accurately and in a timely manner, taking any necessary action to improve the completeness of data and information
- Carrying out comprehensive annual reviews of trusts and companies within portfolio
- Manage, supervise, train and develop junior members of staff and oversee their work. Motivate, encourage and appraise junior members of staff in order that the overall service provided meets with the needs of both clients and the business
- Closing of accounts per standard checklist by adhering to Company / Compliance procedures and to ensure satisfactory completion to the agreed timescales
- Ensure all written and verbal communication is of the highest professional standard
- Maintaining records of daily time spent on time billing modules
- Complying with all regulatory and legislative requirements in accordance with the regulatory licenses held by the business, including any codes of practice and regulatory guidance
- Any other tasks as may be required from time to time

Technical Skills

- Good level of judgement and logical approach to problem solving.
- Good standard of oral and written communication skills.
- Self-motivated and have the ability to work under pressure.

- The ability to deal with client and professional advisors thereby showing a commitment to providing a quality service.
- Good internal personal skills in dealing with clients, colleagues and senior management.
- Good time management and organisational skills.
- Have ability to multi-task.
- Able to work on own initiative and to be highly disciplined.

Professional Qualifications:

Diploma qualified STEP or ICSA or hold an exemption from the JFSC

Key Performance Indicators: (KPI's)

- Develop new client revenues (if possible)
- No client loss for service related issues
- Meet or exceed utilization targets
- Complete time records within agreed time frame
- Effective management of workload
- Assist junior members of staff when required
- Ensure that Annual Review targets are met
- Ensure that tasks are carried out in a timely manner

Competencies	Behavioural Indicators
Technical Knowledge	<ul style="list-style-type: none"> — Demonstrates a good level of knowledge and judgment, including skills at the depth and of a scope appropriate for the role, but prepared to seek advice and guidance when necessary. — Is able to share that knowledge with others, as appropriate. — Demonstrates a keenness to continue acquiring further knowledge and experience.
Performance Management	<ul style="list-style-type: none"> — Proactively informs management of situations where he or she either has too much or too little work. — Shows the ability to identify and escalate issues — Makes time to assist other administrators or trainees when required. — Demonstrates the ability to take on additional work.
Leadership and Inspiring others	<ul style="list-style-type: none"> — Demonstrates basic appreciation of leadership ideals. — Contributes by creating a motivational and positive environment. — Sets high personal standards and sets an example for others.
Client Focus	<ul style="list-style-type: none"> — Develops and maintains effective working relationships with clients. — Responds to specific needs to the clients' satisfaction. Fulfils clients' expectations. — Anticipates and responds to client needs. — Escalates issues or tasks when required to meet client needs. — Follows all business processes, policies and systems to deliver agreeable customer service levels.

	<ul style="list-style-type: none"> — Looks for opportunities to increase business through existing clients.
Commercial Awareness	<ul style="list-style-type: none"> — Demonstrates sound commercial awareness in all activities. — Understands the commercial measures for their role. — Possesses a general knowledge of Fiduciary industry, customer services and competitors. — Shows an understanding of the department objectives and relays information upwards that may impact on the business.
Team Working	<ul style="list-style-type: none"> — Makes positive contribution to the team and builds rapport with colleagues. — Demonstrates awareness of the ways in which own behaviour impacts performance of the team. — Seeks to resolve conflicts with others. — Treats everyone with dignity and demonstrates commitment to equality and diversity. — Actively seeks to develop a good team spirit. — Helps manage work relationships where appropriate.
Risk Awareness and Compliance	<ul style="list-style-type: none"> — Demonstrates a good awareness of relevant risk and regulatory considerations affecting his or her day to day job, applies them practically and escalates concerns to Manager where necessary. — Adheres to all legal, regulatory, financial crime prevention, information security, procedural and risk management affecting his/her day to day job. — Proactively acts to address areas of weakness within his/her team, in consultation with his/her manager. — Escalates all issues of concern to Manager /Director.

The job holder may be required to undertake any other reasonable additional duties as required