

PAS ADMINISTRATOR

REPORTING RELATION

Team Leader

PURPOSE OF JOB

Provide an experience where the client really feels cared for as part of our promise to show a deep desire to care for the families we serve

KEY RELATIONS

All internal and external.

QUALIFICATION AND EXPERIENCE

Grade 12 (Good Mathematics or Accounting marks are preferred
(Grade 12: at least Standard Grade B, Tertiary: at least 60% -70% for first year)
Tertiary education is not required but will be an advantage.

EXPERIENCE

Min 3 years experience in investment and planning environment and LISP Experience

COMPUTER COMPETENCY REQUIREMENTS

Microsoft packages
Fusion/Maxim

COMPETENCIES	KNOWLEDGE	PERSONAL CHARACTERISTICS
<ul style="list-style-type: none"> • Detail orientated • High levels of accuracy • Disciplined • Good organisational skills • Willing to learn and grow • Be a team player 	<ul style="list-style-type: none"> • Knowledge of financial services industry and products 	<ul style="list-style-type: none"> • Adequate reasoning ability (common sense) • Methodical and hardworking



KPA/ STRATEGIC BUSINESS DELIVERABLES

- Effectively processing the number of transactions against the time allocated.
- Taking the transaction through all the steps to finalisation within SLA - (Indexing; Verify Capture, Authorise, doc loaded,
- Executing transactions timeously and correctly.
- Following the correct transaction process.
- Allocate correct follow up date for transactions
- Action on follow up date
- Write clear notes on work objects ensuring that data/communication captured facilitates easy access to the progress of the instruction.
- Follow up with Advice and external suppliers within SLA
- Adhoc projects as and when required.
- Coaching and supporting new Team Members.