LEGAL-ADMIN TEAM: SENIOR ADMINISTRATOR

REPORTING RELATION

Operations Team Leader

PURPOSE OF JOB

Responsibility for processing and client service activities relating to the range of retirement and post retirement products we administer within PAS (Peregrine Administration Services)

KEY RELATIONS

Internal clients – advice and advice assistants
PAS team

QUALIFICATION AND EXPERIENCE

Relevant qualification or B Com degree, financial or business management

EXPERIENCE

Min 5 years' experience in LISP retirement products

COMPUTER COMPETENCY REQUIREMENTS

Microsoft packages

COMPETENCIES	KNOWLEDGE	PERSONAL CHARACTERISTICS
• Good administration skills • Highly methodical • Self-starter who is willing to take on responsibility for a wide array of tasks • Numeric ability • Accuracy and Attention to detail • Time management • Ability to work under limited supervision	• Knowledge of financial services industry and products • Knowledge of retirement funds and life products	• Good people skills • Client serving nature • Emotionally intelligent

KPA/ STRATEGIC BUSINESS DELIVERABLES

Technical oversight

- Regulatory compliance - ensure systems and processes are compliant and understand regulatory rules and controls wrt to legal administration (compulsory product processing and events death, divorces, disability)
- Work with the legal and compliance team to un-pack regulatory changes impacting legal administration and put into system and process
- Attend /represent at internal governance and management forums e.g. trustees board for the retirement funds, PAS Manco
- Work with processes and training to update key processes
- Work with processes and training to keep the knowledge base up to date with regulatory and business rules related to legal administration.

Process management

- Be in a position to administer and oversee the following
    - Processing of death, disability, divorce order and maintenance claims as required.
    - Processing of retirement, pre-retirement and emigration withdrawals as required.
    - Processing of transfers related to Retirement Funds and Living Annuities.
    - Processing of maintenance instructions including switches, change of details and Annuity Revaluations.
    - Resolution of complex cases
    - Apply or cancel relevant Tax Directive and ROT applications on ITax as and when required.
    - Complete manual ROT request and forms related to transfers.
    - Liaise with external Suppliers regarding transfers, withdrawals and claims from Retirement and Living Annuity Products within SLA.
- Review and authorisation of the legal administration team cases.
- Ensure all workflow items are actioned, i.e., processed or pended daily and clear notes updated on workflow system
- Assist the operations team leader to manage legal administration operational risk by;
    - Case reviews
    - Review of workflow items near /over SLA
    - Review of pending cases
    - Review of key risk metrics like o/s ROTs and complaints