Role Profile and Person Specification

Role Profile	
Job Title: **Business Administrator**	Hours of work: **Mon – Fri 08.30– 17.30 (40hpw)**
Salary: **Up to £21,000 per annum**	Reporting to: **Head of Vantage / Head of SIPP Operations**

Summary

Both the Vantage and SIPP Operations departments provide a high level of support to clients within our award winning Vantage Service.

The Vantage department has the task of overseeing our Vantage ISAs and the Fund & Share Account. With responsibility for ensuring all new subscriptions and investments are processed effectively and efficiently. This applies to both paper based and online applications. The Vantage department also arranges the transfer of existing ISAs, funds & shares into our Vantage Service. In addition to this the team is tasked with the maintenance of existing Vantage accounts and responding to the client queries regarding the Vantage Service.

The SIPP department acts as a support centre for clients wishing to open or administer an existing Hargreaves Lansdown SIPP. Currently one of the busiest areas of Hargreaves Lansdown, the team are responsible for the processing of new contributions, pension scheme transfers and the day to day management of the SIPP.

Please note that during busy periods it may be necessary to provide cover for departments on evenings or weekends. Overtime will be paid for covering additional hours and all employees will be expected to volunteer to do overtime from time to time.

Key Duties & Responsibilities:

- Ensure business received on a daily basis is logged, checked, processed and acknowledged in a timely manner, as specified by your team leader
- Carry out sufficient Anti-Money Laundering checks for all relevant parties in accordance with company procedure
- Ensure efficient placement of investment instructions
- Double checking of all processing to ensure accuracy
- Ensure any applications not in good order are recorded and clients contacted in good time
- Accurately record, update and respond to all client enquiries in a timely manner using the most appropriate medium e.g. telephone, email or letter
- Liaise with clients and 3rd party companies where necessary in a professional and considerate manner
- Production of documentation as requested by clients in relation to their accounts.
- Ensure knowledge of HL products and literature as well as regulations is up to date

HARGREAVES LANSDOWN

Person Specification

	Essential	Desirable
Qualifications	• A levels Grade C or above (or equivalent) • GCSE English Language and Maths, Grade C or above (or equivalent)	• Degree (or relevant experience)
Knowledge	• Basic computer literacy • Basic knowledge of products and services offered by Hargreaves Lansdown	• Knowledge of Financial Services • Competent computer user; proficient in Microsoft Office
Experience		• Any relevant work experience (e.g. in an office, administration, customer service role) • Experience of financial services
Skills	• Excellent attention to detail • Proven ability to perform under pressure • Good communication skills • Good organisational skills • Good telephone manner	• Confident, accomplished telephone manner • Excellent written and numeracy skills • Proven ability to use initiatives • Ability to effectively prioritise workload and meet deadlines
Attributes	• Pro-active and positive • Team player • Professional, presentable appearance • Client satisfaction orientated	• Genuine interest in financial services