

## Role Profile and Person Specification

Role Profile	
Job Title: <b>Pensions Technical Manager</b>	Hours of work: <b>37.5 hours per week</b>
Salary: <b>£40,000 - £50,000 (depending on experience)</b>	Reporting to: <b>Head of Advisory Services</b>

### Summary

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The job holder will be responsible for managing the firm's ability to undertake pension transfer business, particularly with regard to occupational pension schemes; the role also has a wider remit to act as a technical pensions and pension transfer specialist covering all areas of UK pensions legislation.

#### Key Duties & Responsibilities:

- Provision of expert technical pensions knowledge and guidance
- Management of pension transfer activity, particularly in the context of occupational pension schemes, including associated analysis and transfer value summaries
- Management of at least 1 direct report

### Person Specification

	Essential	Desirable
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>• Qualified as a pensions specialist to G60 /AF3 (or equivalent)</li> <li>• Qualified to provide pension transfer analyses</li> </ul>	
<b>Knowledge / Experience</b>	<ul style="list-style-type: none"> <li>• Must have a number of years' pensions experience and have a good knowledge of complex pensions transfers</li> <li>• Experience in providing potentially complex or technical information in a clear, unambiguous and fair manner</li> <li>• Must have a solid understanding of occupational pension scheme (including defined benefits) rules and regulations and their application</li> </ul>	
<b>Skills / Competencies</b>	<ul style="list-style-type: none"> <li>• Excellent Attention to detail</li> <li>• Ability to accurately assess and interpret pension transfer details and associated legislation (linked to advanced numeracy skills)</li> <li>• Excellent written communication, both in the context of formal outputs and keeping people informed</li> </ul>	

<b>Attributes</b>	<ul style="list-style-type: none"><li>• Regarded by colleagues as a pensions expert</li><li>• Strong organisation and administrative ability</li><li>• Ability to prioritise and manage own workload</li><li>• Proactive and able to demonstrate initiative</li></ul>	<ul style="list-style-type: none"><li>• Demonstrable interest in advisory service</li><li>• Willingness to continuously learn and develop relevant knowledge and skills</li></ul>
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*Written by: Head of Advisory Operations*

*Authorised by: Head of Advisory Services*

*Date: 02/12/14*