



JOB TITLE **Investments Team Administrator**

COMPANY **Independent Trustee Company Ltd**

Independent Trustee Company is an Irish owned company, established in 1994. We employ over 85 staff. Our focus is to deliver flexible and transparent pension plans for our clients.

We are now one of the largest providers of self-administered pension structures in Ireland. We administer in excess of **€3 billion** in client funds through over **6,500** pension structures. Our clients are self-employed individuals, professionals, company directors, corporate clients and financial advisors.

We pride ourselves on our high-quality service and ensure our staff have the skills and expertise to provide a highly efficient and professional service to our clients and advisors.

We are approved by the Revenue Commissioners and the Pensions Authority as Pensioner Trustee and are regulated by the Central Bank of Ireland. We are also approved Trustee Trainers by the Pensions Authority. We are one of the founding members of the Association of Pension Trustees of Ireland.

JOB DESCRIPTION

The Investments Administrator will be responsible for the administration and processing of investments on our core products and services for our clients in a busy team environment. Our core products include Small Self-Administered Schemes (SSAS), Self-Invested Personal Pensions (SIPP), Approved Retirement Funds (ARF), Personal Retirement Savings Account (PRSA), Buy out Bonds (BOB) as well as our unit trust structures.

The ITC Group have made the decision to work from home on a permanent basis. Therefore, this role is exclusively a remote working opportunity.

Applications can be made via careers@itcgroup.ie

SALARY

Salary is €30,000 per annum.

KEY RESPONSIBILITIES

This is primarily an administrative role supporting our Clients, Intermediaries, Sales Team and other Departments within the company. The typical day to day workload of an Investments Administrator would broadly consist of 60% administration work, 30% liaising with Investment Providers and Advisors, and 10% preparing reports. Some of the major attributes of the role include:

- Assessing new investments for our core products to ensure that they meet the ITC requirements prior to investing
- Processing of new investment applications for our clients
- Manage both new and existing book of private equity investments
- Liaising with numerous third parties including Advisors, Investment Providers, Stockbrokers and Banks to ensure investments are managed in line with our procedures and rules
- Deliver a first-class service to our Financial Advisors and Clients in line with our company policies
- Ensuring all requests are processed in a timely manner
- Ensuring that information provided in the client SORP is up to date and accurately reflects both the charges and asset mix of the scheme's investment(s)
- Arrange for all banking requests to be processed in a timely manner

REQUIRED SKILLS & BEHAVIOURS

- Communicate enthusiasm and commitment to achieving objectives and contributes to their team
- Aptitude to organise tasks and manage workload efficiently
- Ability to work both on own initiative and as part of a team
- Listens to the needs of customers and act on what they are saying
- Actively seeks out views, opinions and ideas from others
- Investigate issues/problems to their best ability and seek assistance with basic understanding completed
- Communicates with others in a professional and helpful way, conveying information clearly and concisely
- Actively monitors own performance against personal, team and company targets
- Understands the nature of their job requirements and who these services are targeted towards.
- Shows respect for other members of the team and provides support for one another

QUALIFICATIONS / EXPERIENCE REQUIRED

- A minimum of 1 year experience in client facing role
- Good understanding of the basic principles of customer service
- Working knowledge of MS Office, Outlook and experience using any in-house systems
- Business or Financial qualification, beneficial but not required
- Previous pension experience is beneficial