

UNIT TRUST CONSULTANT

Perm, CTC Salary 195k – R235k per annum *NEG – depending on skills and experience, Company based CBD, candidate must be flexible. Normal company benefits apply.

Our client, a Prestige Financial Services Company based in the CBD has **exciting opportunities** available within their **Retail Division**.

The job requires the candidate to work actively within a team and its daily processes and procedures. The candidate will be responsible for ensuring that all incoming work is seen to, that any pending work is followed up on time to ensure that the case is finalized and to maintain contact with IFA's and clients. This person will need to be flexible, energetic, and trustworthy, organized, self-disciplined, and enjoy working in a team environment.

Key areas of responsibility

- Confirming receipt of instructions with clients telephonically.
- Performing validations on incoming client instructions in relation to:
 - Various legislative requirements relating to life and retirement products
 - Completeness and accuracy of instruction from client/broker
 - Proof of payment or money transfer
- FICA requirements complied with (where relevant)
- Processing of incoming instructions in respect of:
 - New business transactions
 - Existing business transactions (investments, retirement's, withdrawals & switches)
 - Amendments to existing static data (investors, advisors, employers)
- Ensuring all incoming work is captured within required turnaround times and before relevant cut offs.
- Attending to queries from clients, IFA's and internal customers and responding to queries on time and diligently.
- Providing clients/ IFA's with superior levels of service
- Maintaining records of all interactions with clients / IFA's on Siebel
- Correct and timeous rectification of errors
- Liaise with clients / IFA's regarding the correct implementation of instructions received to meet with our service delivery standards to our clients.
- Support fellow team members and Team Coordinator.
- Add hoc duties as may be required from time to time.

Job specification

- Relevant experience – Relevant Business/Bcomm Degree or Job Related Experience would be an advantage but not essential. Sound knowledge of the Unit Trust industry would also be an advantage.
- Intermediate Computer Literacy – Word, Excel, Email

Competencies

- Accuracy and Attention to Detail
- Excellent Time Management Skills
- Excellent Problem Solving Skills
- Excellent Verbal and Communication skills
- Ability to function well under pressure

Normal Office Hours Apply

“Insert UNIT TRUST Consultant in subject line”

Email careers@wenzrecruitment.co.za OR
Fax 086 628 7245

