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| Role & Responsibilities |
| Defined Benefit |
| * Calculate complex retirement quotes and checking |
| * Calculate complex leavers benefits and checking |
| * Calculate complex death benefits and checking |
| * Calculate complex spouse's benefits and checking |
| * Check transfer value statements |
| Defined Contribution - optional |
| * Calculate complex retirement quotes and checking |
| * Calculate complex leavers benefits and checking |
| * Calculate complex death benefits and checking |
| * Calculate complex spouse's benefits and checking |
| * Check transfer value statements |
| Other pensions tasks |
| * Run/check pension increases |
| * Check renewals |
| * Manage/check trustee bank account |
| * Check Bulk mailings |
| * Check Bulk calculations |
| * Draft letters |
| * Draft reports |
| * Checking administration reports |
| * Provide support for Annual Report & Accounts |
| * Management of pensioner payrolls |
| * Review working practices suggesting enhancements |
| * Complete / check annual scheme returns |
| * Dealing with non-standard client/member queries |
| * Sign off valuation data |
| General tasks |
| * Achieve SLAs wherever possible |
| * Log work |
| * Manage own workload |
| * Complete accurate timesheet |
| * Team Leader |
| * Assist with training of team members |
| * Carry out other duties and take on additional responsibilities as may be required from time to time |
| * Take ownership of own development |
| Qualifications |
| * Minimum 8 GCSEs inc Maths and English |
| * A levels/degree would be advantageous |
| * Willing to study for professional exams - APE, RPC, ADRP, CPC |
| Knowledge, experience, skills |
| * Minimum of 4 years' experience of defined benefit/defined contribution pension scheme administration |
| General Management |
| * Good time management. Capable of prioritising work at short notice with little or no additional support. |
| Analytic |
| * Logical approach to problem solving |
| * Process, collect and input data and information as delegated |
| * Ability to prioritise workload, keeping to deadlines and disclosure requirements |
| Communication |
| * Answer queries by telephone, letter and email |
| * Communicate effectively with colleagues and clients |
| Interpersonal |
| * Ability to work as part of a team |
| * Motivate, team build and lead pensions administrators |
| * Provide constructive feedback about colleagues |
| * Project a positive attitude towards our Firm |
| Information Technology |
| * Computer literate in use of office systems e.g. Microsoft Office for word processing, spreadsheets, database. Time recording and charging to clients. |
| * Experience of Compendia or equivalent system. |