Job Description Pensions Administrator

Role & Responsibilities

Defined Benefit

- Calculate retirement quotes
- Calculate leavers benefits/up to date statements
- Calculate death benefits
- Calculate spouse's benefits
- Check transfer values and issue statements

Defined Contribution - optional

- Calculate retirement quotes
- Calculate leavers benefits
- Calculate death benefits
- Calculate spouse's benefits
- Check transfer values

Other pensions tasks

- Run pension increases
- Process renewals
- Manage trustee bank account
- Bulk mailings
- Bulk calculations
- Use standard letters
- Peer checking of simple letters (i.e. return of certificates)
- Draft administration reports
- Ensure Compendia is up to date
- Provide feedback on working practices
- Provide information for/complete annual scheme returns
- Take responsibility for identifying upcoming NRDs
- Requesting valuation data and carrying out data checks

General tasks

- Achieve SLAs wherever possible
- Log work
- Manage own workload
- Complete accurate timesheet
- Support seniors, Team Leaders and Admin Managers
- Carry out other duties and take on additional responsibilities as may be required from time to time
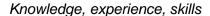- Take ownership of own development

Qualifications

- Minimum 8 GCSEs inc. Maths and English
- A levels/degree would be advantageous
- Willing to study for professional exams - APE, RPC, ADRP, CPC

Job Description Pensions Administrator

Knowledge, experience, skills

- The level of role would depend on experience; willing to take on people new to pensions if they have the relevant qualifications or can demonstrate learning skills

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
- Project a positive attitude about our Firm.

Interpersonal

- Ability to work as part of a team
- Provide constructive feedback about colleagues
- Project a positive attitude towards our Firm and its people.

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 computerised administration system required unless new to pensions. Must show a relevant aptitude