

## Vacancy Advert for Internal (VOX) & External use

### **SSAS Administrator**

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#### **Job Description**

Morgan Lloyd is looking for a hardworking and professional Pensions Administrator to join their team. The individual will manage a portfolio of SSAS and SIPP pension schemes and undertake various administrative duties within strict deadlines to a high standard.

For this position the individual should be able to use their strong organisational and communication skills to provide excellent customer service. The individual will have an understanding of the financial industry and be confident with dealing with Financial Advisers and clients in a fast-paced environment.

An understanding of various investment options such as SSAS loanbacks and commercial property purchases is required. Details of the role are as follows:

#### **Responsibilities (Duties & Capabilities)**

- Manage and maintain a portfolio of SSAS and SIPP pension schemes
- Main contact for internal/external Financial Advisers and scheme members
- Calculation and payment of pension benefits
- Takeover of existing schemes and transfers away to other providers
- Preparing, archiving and retrieval of documentation
- Process online banking payments for invoices, fees and investments
- Oversee commercial property purchases and sales and liaise with solicitors
- Completion of loanbacks, Intellectual Property purchases and share acquisitions
- Liquidation claims
- Scheme wind-ups
- Help resolve member queries and disputes
- Usage of internal database for accurate record keeping
- Keep up to date with pension legislation and law
- Provide training and support to less experienced staff, updating of procedure guides and offer process improvement suggestions
- Undertake a variety of administrative duties as per team requirements within strict Service Level Agreements

#### **Requirements (Competencies & Expertise)**

- Experience with administering the following is desirable:
  - SSAS loanbacks
  - Commercial property purchases and/or sales
  - Knowledge of shares
  - BCE – tax free cash and/or pension income calculation and processing

- New scheme registrations
- Day-to-day SSAS and/or SIPP administrative responsibilities
- Ability to work and think under pressure independently and as part of a team
- Be flexible and adaptable
- Excellent organisational and skills and high attention to detail
- Familiarity with office equipment (scanners, printers etc.)
- Computer literacy (MS Word, Excel and Outlook)
- Strong verbal and written communication skills
- Excellent numeracy skills
- Ability to remain calm when under pressure while maintaining quality and meeting deadlines
- Professionalism and ability to demonstrate excellent customer service
- Strong organisational and time management skills
- Able to build rapport and relationships with clients and colleagues
- Experience with handling external incoming telephone calls and dealing with internal and external clients and providers
- Professional qualifications desirable but not essential
- Experience and knowledge of financial services, specifically the pensions industry

Salary range: £20,000 - £30,000

If you know of anyone interested in applying for the role, or want to apply yourself, please contact [sian.carwithen@morgan-lloyd.co.uk](mailto:sian.carwithen@morgan-lloyd.co.uk) or [luke.walker@morgan-lloyd.co.uk](mailto:luke.walker@morgan-lloyd.co.uk)

Closing Date: 08<sup>th</sup> May 2024