



WHITEHALL

whitehallgroup.co.uk

Job Description - Account Manager

Whitehall Group, the Best SSAS Provider for the last four years at the Investment Life & Pensions Moneyfacts Awards, are looking for a new Account Manager to join their highly successful team. The chosen individual will take charge of a portfolio of SSAS pension scheme and manage the client relationship through the whole pension scheme lifecycle from the point the pension scheme is set up through to retirement and drawdown and ultimately the process of dealing with death benefits following the member's death. They should do this whilst upholding Whitehall's key values of Integrity, Understanding, Respect, Ambition and Responsibility at all times.

Key duties within this position are the building and maintaining of relationships with both clients and financial advisers and acting as a designated point of contact for all their queries and questions. The individual will take full ownership for managing work volumes and priorities and to produce work of the highest standards and in line with HMRC regulations for UK registered pension schemes.

The successful candidate must be quickly adaptable and positive in a fast-paced environment, be able to follow policies and procedures whilst paying attention to detail and work effectively with their peers to meet business goals.

Responsibilities:

- Building and maintaining positive working relationships with clients, IFAs and key stakeholders
- Handling general scheme correspondence
- Handling all pension scheme investments, top-ups and sales including standard and non-standard investments, loans, commercial property transactions and unquoted equity
- Processing retirement benefit and pension drawdown requests and arranging pension payment through pension payroll
- Carrying out fund split calculations for benefit and anniversary purposes
- Handling a variety of death benefit payments and ensuring that work is completed within regulatory deadlines
- Handling pension sharing orders when a member gets divorced and ensuring that work is completed within regulatory deadlines
- Making pension scheme alterations
- Processing contributions, transfers-in and transfers-out
- Liaising with banks, insurance companies and investment providers
- Taking enquiries by telephone, email and in writing
- Issuing standard reminder letters
- Performing pension scheme administrative tasks which arise
- Filing regulatory returns
- Updating our back-office system
- Producing Trust Deeds and Trustee Resolutions
- Making clear and concise telephone and file notes
- Drafting both standard and non-standard letters in a clear, concise and grammatically correct manner
- Providing exceptional customer service
- Working within the defined company policies and procedures as well as the risk and governance framework
- Acting with professionalism and integrity in all contact with colleagues, members and third parties

Skills, Knowledge and Experience:

- Excellent Customer Service skills
- An understanding of registered pension schemes and HMRC pension legislation
- Strong written and verbal communication skills
- Ability to follow policies and procedures methodically
- High standard of work, accurate record keeping and attention to detail
- Good numerical skills
- A team player and able to work independently using your own initiative
- Good analytical and problem solving skills
- Ability to work in a fast-paced environment whilst dealing with a high number of cases. Workload is managed efficiently and effectively as a result
- Excellent time management and the ability to work under pressure to meet deadlines
- SSAS pension administration experience: 3 years (preferred)
- Financial services/other pensions industry : 3 years (preferred)

Job Type:

- Permanent

Based:

- 8-10 Bolton Street, Ramsbottom, BL0 9HX

Salary:

- £25,000.00-£40,000.00 per annum FTE

Additional Benefits:

- Annual discretionary bonus
- Company pension
- Flexitime policy
- Death in service
- Sick pay

Hours:

- Monday to Friday
- 9am-5pm
- 60 minute lunchbreak

Whitehall is the trading name of:

Whitehall Group (UK) Limited, a company registered in England and Wales (Registered number 07625300), Whitehall Trustees Limited, a company registered in England and Wales (Registered number 07625294), Whitehall Corporate Limited, a company registered in England and Wales (Registered number 7759590), Whitehall Group SIPP Limited, a company registered in England and Wales (Registered number 13577749) and Whitehall SIPP Trustees Limited, a company registered in England and Wales (Registered number 13587700). All companies have their registered office at 8-10 Bolton Street, Ramsbottom, BL0 9HX.

Whitehall Group SIPP Limited is authorised and regulated by the Financial Conduct Authority (FCA) firm reference number 978183.