GROUP BENEFITS ASSOCIATE

## As a Group Benefits Associate you would handle the day-to-day administration duties of pension schemes and life insurance policies to include:

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Assisting the Group Benefits Senior Associate with:

* Processing monthly pension schedules and liaising with relevant person in the Company Payroll / HR Dept and the scheme provider
* Processing monthly contributions
* Calculating pension forecasts and preparing statements
* Running annual electronic AML check at review date / new scheme / new business
* Compliance checks at review date
* Dealing with bespoke adviser, scheme and individual member queries and answering queries by telephone, in writing or by e-mail
* Act as a point of contact for the client in the adviser’s absence and deal with client queries
* Form Processing in relation to review / new schemes
* Group protection scheme re-broking annually / 2 yearly or Tri-Annual
* Group Protection Change of Risk Requests
* Group Protection Claim Processing
* Add schemes / members to back office system, Xplan, and ensure information is fully completed and kept up to date
* Update plan details as a result of any provider instructions via email / post
* Prepare meeting and review packs for advisers
* Send Member templated letters including for new joiners, nearing NRD and retirement options
* Send Scheme templated letters including confirmation of new members
* Send Valuation reports to the client with appropriate covering letter if requested
* Creating invoices and send to client and track to ensure payment is made
* Add fees to XPLAN ensuring the correct adviser banding rate and splits are added if applicable
* Ensure any change in initial / ad-hoc fee amounts are communicated to Finance so that the monthly WIP can be updated
* Obtain policy information for paraplanners as required
* Obtain quotes for paraplanners as required
* New Clients Procedure
* Client Left Agency Procedure
* Deceased Clients Procedure
* Change of address Procedure
* New Business Procedure
* Complete Review dairy / task in XPlan
* Tracking for all the above
* Assist with mail merge exercises
* If absent, ensure above is covered
* Keep up to date with pension and tax laws

**Person specification**

The ideal candidate will:

* have a minimum of 18mths financial services experience, ideally in Group Benefits
* have had experience of working with a CRM system
* be conscientious, have attention to detail and be a team player
* have used Excel

Interested candidate please send your CV to [Linda.Tottem@Kingswood-Group.com](mailto:Linda.Tottem@Kingswood-Group.com)