

Name of the Role: Operations Consultant - Transfers

Role Description:

We are looking for an exceptional individual to join our Retail Client Service Centre as a Team Leader. In this role you will be instrumental in our pursuit of servicing excellence, ensuring seamless daily management of our environment and driving the highest level of service delivery. Are you ready to take charge, inspire a team, and make a lasting impact?

Duties and daily responsibilities:

- Perform due diligence procedures on instructions in line with the relevant RMCP and verification tools to assess whether a client and related flows may be accepted in terms of laws and regulations.
- Perform product validation procedures on the instruction in terms of laws and regulation.
- Perform business validation procedures instructions in terms of the LISPs Terms and Conditions.
- Request and manage all outstanding requirements by engaging with clients and business partners in a timeous and professional manner.
- Undergo inspection and analysis of various bank accounts to match unallocated deposits to client instructions.
- Request and manage all outstanding requirements of unallocated deposits with external parties to ensure fast turnaround of such deposits to valid client instructions.
- Report suspicious activities within the business structures without hesitation.
- Capture accepted and valid instructions in varying systems, completely and accurately.
- Ensure daily management and updating of dashboards and duties to ensure that no SLA and business processes are compromised.
- Collaboration between the administration team and the Client Service Team.
- Maintain strong internal departmental relationships that will foster the growth of a culture in line with the Sygnia Group and Sygnia LISP strategies and vision.
- Identify gaps in processes and report these to the line manager.
- Understand and adhere to the appropriate policies, standards, and procedures applicable to the role.
- Understand and engage in risks and risk events relevant to the role and immediately report any findings to the line manager and supporting departments.
- Maintain a healthy team spirit by assisting peers where needed, and where reasonably required, process adhoc tasks as delegated to maintain stability of operations.

Role qualifications and experience:

- BCom or equivalent undergraduate degree /diploma is preferable
- At least 3-5 years' experience in the Linked Investment Service Provider (LISP) environment administration is preferable
- Experience in the following Financial Services industries is an advantage:
- LISP
- Collective Investment Schemes
- Retirement Funds/Employee Benefit Funds
- Linked Life Companies
- A thorough understanding of Tax Free Savings transfers and Direct Investment transfers. This includes both cash and unit transfers.
- A thorough understanding of the Section 14 (1), (8) and Section 50 (Directive 135) transfer process
- A thorough understanding of transfer from retirement (Recognition of transfer) process
- A thorough understanding of the benefit process including retirement, death claims and withdrawals
- A good understanding of the regulations governing retirement funds and living annuities
- Strong working knowledge of word processing, and spreadsheets (MS Word, Excel)
- Strong organisational skills, resilient and able to function in a fast paced and high-pressure environment
- Meticulous, deadline driven and reliable
- Strong sense of duty and accountability
- Self-starter proactively taking ownership of development
- Client focused with good verbal and written communication skills
- Exhibit a professional image in person, demeanor, and communication
- High degree of team- and self-awareness

To apply:

Email: Sesethu.Gobelo@sygnia.co.za

Should you not hear from us within 14 days after submitting your application, please accept your application as unsuccessful.



Disclaimer:

Please be advised that your personal information shared on your resume will only be used as part of the Sygnia recruitment process for the role applied for. It will not be shared with any third parties for any other reason.