Sygnia Asset Management

Date	Topic
6 August 2025	LISP Maintenance Consultant- Voluntary and Retirement Products

The Maintenance Consultant within the LISP (Retail) department will report to the Maintenance team leader and will be responsible for validating and processing of voluntary and retirement products, such as Endowment Policies, Tax Free-Savings, Investment accounts, Preservation Pension and Provident, Retirement Annuity and Living Annuity They will ensure the timely and accurate processing of instructions from clients, brokers, and the like in accordance with applicable policies and laws. In addition, this function requires coordination of legislation, workflow management, and regular report generation.

Duties And Daily Responsibilities:

- Validate and verify instructions and supporting documentation.
- Process instructions received within SLA in accordance with the relevant policies, legislation, and procedures.
- Manage cases on dashboards with the objectives of high degree of client centric outcomes.
- Engage in communication with stakeholders, including query management, to complete instructions and manage stakeholder expectations.
- Staying up to date with industry requirements and relevant legislation.
- Providing accurate information to clients and building and maintaining relationships with internal and external stakeholders.
- Making recommendations for improving client service and fair treatment of clients within the scope of responsibility.
- Maintenance of, but is not limited to,
- Updating of client's personal details
- Change of debit orders
- Change of beneficiaries
- Updating banking details
- Consolidations of products via Unit Transfer
- Switches
- Regulation 28 calculations
- Rebalancing of client portfolios
- Living annuity income reviews
- Regular withdrawal amendments

Role Qualifications and Experience:

- At least 1-2 years of experience within financial services administration (Essential).
- Sound process knowledge about Life, Retirement and Voluntary products.
- Relevant Business/Commerce degree or studying towards your degree (Advantageous).
- Ability to work independently.
- Strong attention to detail.
- High level of numeracy and accuracy.
- Good analytical/problem-solving skills.
- Good communication skills, both written and verbal.
- Proactive individual who is willing to take responsibility and accountability for allocated tasks.
- Excellent organizational skills.
- Solid knowledge of the retirement fund industry and legislation.

To apply:
Email CV to: recruit@sygnia.co.za
Closing date: 6 August 2025

For more information:
Contact: Sesethu Gobelo
mail: recruit@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 CV 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.