

Department: Operations, Novia Global

Reports to: Customer Services Manager

Main Location: Cambridge House, Henry Street, Bath – Office based

About Novia Global:

Novia Global launched in 2015 and is an international online wealth management platform. We provide the technology to enable professional advisers to invest efficiently on behalf of their clients.

Our aim is to meet the investment needs of the internationally mobile client, nationals who have moved abroad and trustees requiring access to greater investment choices.

Through the platform, we offer access to a Global Investment Account and an International Self Invested Personal Pension (SIPP) with underlying assets include investment funds, exchange traded funds and shares. For more information about us, please visit <https://www.novia-global.com>

Job Summary/Purpose:

The primary focus of this role will be to support top tier advisor accounts with:

- > **Administration** – to provide administration support to Financial Adviser firms, Trust Companies and Clients specialising in the management and administration of the SIPP
- > **Customer Relations** – deal with any queries and requests from the Financial Advisers firms, Trust Companies, and on occasions, their clients.
- > **Escalations** – escalate any issues to Line Manager as necessary.

Specialist Skills, Qualifications and Experience:

Essential:

- > Have experience working with Self Invested Personal Pensions (SIPPs)
- > Excellent interpersonal and communication skills.
- > Ability to work well individually, and as part of a team.
- > Data processing skills.
- > Good attention to detail.
- > An ability to prioritise work
- > Self-motivated.
- > Work as part of a team to achieve team and personal objectives.
- > Willingness to learn.

Desirable:

- > Have Wrap platform knowledge and/or experience, although on-the-job training will be provided.
- > Have a Financial Services qualification (E.g. IOC or CII).
- > An interest in financial markets and investments.

Key Responsibilities:

- > Continually focus on delivery of excellent customer service to ensure that the Company is highly valued by our clients.
- > Ensure that the FCA Treating Customers Fairly (TCF) principles are adhered to, including raising any areas for concern with either Line Manager or Compliance.
- > Completion of key tasks including LTA calculations, Age 75 tests, Defined Benefit Transfers.
- > Provide administration support across all areas of the Client Services function.
- > Process any external queries received via telephone, email or post.
- > Work as part of a team to ensure that all work gets completed within set Service Level Agreements (SLAs).
- > Manage risk effectively by informing Line Manager of any incidents, 'near misses' or exposures to our risk profile. Comply with all Company policies and report any risk concerns to Line Manager.

You will, from time to time, be required to undertake other activities that fall within your capabilities as directed by management.

Core Competencies:

- > **Performance Focus:** Demonstrate energy and enthusiasm, takes ownership, delivers results and improves personal performance.
- > **Expert Knowledge:** Consistent application of professional or specialist knowledge and skills; takes opportunities to contribute to policy and best practice.
- > **Team Work:** Working successfully with others and building a network of good relationships in order to achieve shared goals.
- > **Client Services:** Taking responsibility for client satisfaction and loyalty by effectively meeting specific client needs and developing and maintaining productive client relationships. Adhering to Treating Customers Fairly principles at all times.
- > **Communication:** Communicate clearly and concisely, tailoring content and style, with ability to make a positive impression on others.

To apply for this role, please email an up-to-date CV to hr@novia-global.com