

Position: Personal Investments Validations Consultant (Intern)  
 Salary range: Negotiable  
 Ideal start date: As soon as possible  
 Reporting to: Validations Team Leader  
 Duration: 23 Month Contract  
 Location: Head Office - Claremont, Cape Town  
 Business Unit: Personal Investments Validations  
 Management responsibility: None

**Please note that preference will be given to candidates from designated groups.**

**JOB SPECIFICATION**

<b>Main duties and responsibilities:</b>	<ul style="list-style-type: none"> <li>• Validation for retirement, local and foreign unit trust products</li> <li>• Advisor application processing for both retirement and unit trust products</li> <li>• Ensure that each broker is licensed to sell our products</li> <li>• Telephonic confirmation with clients of certain transactions</li> <li>• Management of documentation iro FICA &amp; FAIS legislation and other static client data</li> <li>• Ensure our client and intermediaries comply with FICA and FAIS at all times</li> <li>• Management of internal relationships to ensure prompt client response</li> <li>• Constant liaising with administrator/admin support and internal client service consultants</li> <li>• Ensure clients investments are processed timeously and correctly</li> <li>• Follow up on outstanding requirements from clients and intermediaries</li> <li>• Ensure our Retirement clients comply with the Regulation 28</li> <li>• Manage the workflow system and update client information on the CRM system</li> <li>• Responsible to ensure that all client documentation is stored electronically</li> <li>• Coordination of Section 14 and Section 37 transfers</li> <li>• Follow up with all pending cases</li> <li>• General query resolution</li> </ul>
<b>Ideal qualifications:</b>	<ul style="list-style-type: none"> <li>• Graduate with strong Accounting, Investment Management subjects/knowledge an advantage <b>OR</b></li> <li>• Experienced professional with a minimum Matric qualification and 3-5 years relevant industry experience</li> </ul>
<b>Systems knowledge:</b>	<ul style="list-style-type: none"> <li>• MSOffice - Outlook, Excel and Word</li> <li>• Workflow and document management systems</li> <li>• Knowledge of CRM systems would be an advantage</li> </ul>