



JOB TITLE: Operations Support, Beckett Asset Management **DATE:** 1 August 2024
REPORTS TO: Director – Beckett Asset Management **LINE MANAGER TO:** N/A

PURPOSE OF ROLE

- Maintain BAM systems, databases and procedures ensuring they are accurate, up to date and compliant
- Work to continuously improve and maximise system functionality to ensure BAM are delivering the best possible service
- Support the delivery of projects to enhance the service delivered to clients

KEY RESPONSIBILITIES

- Ensure BAM systems, including platforms, databases and procedures are maintained and compliant
- Co-ordinate both investor and fund manager meetings
- Generation and updating of BAM marketing materials
- Assist the investment team with any compliance related activities or queries
- Deliver timely and accurate information and regular updates on projects and allocated tasks to the investment team
- Build and maintain positive working relationships within the BAM team and broader Becketts team and external relationships
- Maintain and update my talent development record, via the Beckett Academy App, ensuring objectives are up to date and impact of any training is recorded
- Ensure compliance with legislation, rules and procedures at all times
- To be a role model for Becketts and behave in a professional manner at all times

PERSON SPECIFICATION

	<i>ESSENTIAL</i>	<i>DESIRABLE</i>
QUALIFICATIONS	<ul style="list-style-type: none">• GCSE qualifications in Maths and English	<ul style="list-style-type: none">• A levels or equivalent experience
EXPERIENCE	<ul style="list-style-type: none">• Providing accurate and timely administrative support	<ul style="list-style-type: none">• Working in a regulated environment
KNOWLEDGE	<ul style="list-style-type: none">• Working knowledge of Microsoft products	<ul style="list-style-type: none">• Basic understanding of collective investments
SKILLS & ABILITIES	<ul style="list-style-type: none">• Attention to detail/accuracy	

- Ability to work pro-actively, on own initiative and as part of a team
- Ability to follow rules and procedures and comply with legislation
- Time management and organisation
- Methodical
- Analytical
- Communication – written and verbal
- Ability to identify and raise any issues or errors

PERSONAL ATTRIBUTES

- Behaving in a professional manner both in the office and with clients
- Trust and integrity
- Willingness to challenge, learn and continuously improve
- Willingness to help and support the wider Becketts team

KEY PERFORMANCE INDICATORS

- ✓ Accurate information provided
- ✓ Systems, databases and procedures up to date
- ✓ Client satisfaction and zero complaints
- ✓ Positive feedback from colleagues and third-party relationships

MAIN CHALLENGES OF THE ROLE

- Manage the volume and prioritisation of work

SIGNATURE

I agree to the above description of my responsibilities.

JOB HOLDER:

Signature:

Print Name:

Date: