

## SENIOR ADMINISTRATOR – CORPORATE SERVICES

JOB IDENTIFICATION	
<b>Job Title:</b>	Senior Administrator – Corporate Services
<b>Reports To:</b>	Manager
<b>Department:</b>	Jersey office of the Appleby Corporate Services international network
<b>Persons to supervised</b>	None

### THE ROLE

#### **Purpose**

To manage a complex portfolio of entities and provide quality administration of same including but not limited to company secretarial activities, limited service monitoring, billing clients on a quarterly/annual basis, assistance in the formation of Jersey companies, administration of employee benefit trusts and assistance to the trustee in respect of new issues of shares and assistance with transactional work for the designated portfolio supported by the team manager/assistant manager and at all times upholding AGS' core values by promoting a culture of professionalism, teamwork and leadership.

#### **Principal Duties and Responsibilities**

- Responsible for the provision of administration and company secretarial services to a complex portfolio of client structures/entities.
- Responsible for causing View Point, AGS' data management system, to be updated for all entities under administration or upon request from line management to ensure that Viewpoint is at all times accurate and that all data gaps are attended to promptly.
- Responsible for review of requests from duly authorised client representatives for changes to constitutional documents and/or the registers for each company, e.g. increases and reductions of share capital, change of name, appointment/resignation of a Director or Officer and/or issuance/transfer of shares, etc. Prepares required documentation and arranges for filings to be filed with the relevant statutory authorities in relation to the changes.

- Maintains the relevant registers for all entities in allocated portfolio of clients plus upon request from line management to ensure that they can be printed and promptly prepared for certification if required by members of the legal team or the duly appointed client representative
- Manages business intelligence, including capturing all contact details (where appropriate) and business development related activity within relevant systems in accordance with internal policies and procedures if requested to do so by line management.
- Files documents as appropriate in the physical files of the company and maintains electronically the records in ViewPoint when receiving general mail and documents from the client, the Companies Registry & the responsible Lawyer, etc.
- Drafts Minutes/Resolutions under guidance of line management and/or with the assistance from the legal team at Appleby in relation to the allocated portfolio of clients.
- Seeks guidance, as necessary, from line management, and other team members where appropriate, in relation to the provision of corporate administration services.
- Ensures that all annual confirmation statements for allocated portfolio are submitted to the Jersey Registry on time each year and that Jersey Tax Returns are submitted to the Comptroller of Income Tax before the 31st December each year. .
- Monitors WIP on a monthly basis to ensure that it is in line with fee agreement, provides a statement of same to clients if requested and ensures invoices are prepared and issued quarterly/annually as per the fee agreement, follows-up on any outstanding invoices on a regular basis and escalates any fee issues to line management on a timely basis.
- Follows-up on missing CDD as necessary to make sure each company is compliant and/or requests the necessary CDD documents where changes have occurred, for example in the Directors and/or Members of companies within the allocated portfolio. Requests assistance from line management or compliance team members as needed.
- Completes time recording on a daily basis to record 7 hours per day either through recording billable or non-billable time.
- Takes responsibility for delegating work to less experienced team members as appropriate and necessary.
- Takes responsibility for a supporting, coaching and developing less experienced team members
- Contributes to the concept of 'teamwork' and displays a positive, can do attitude.
- Performs any other tasks as reasonably requested by line management.

**Knowledge, Skills and Experience Required**

To be read in conjunction with the Appleby Global Services Career Development Framework, with reference to the role of Administrator III. The specific areas of focus are around the three core values of Integrity, Collegiality and Excellence demonstrated through the areas of Client Skill, People Skills, Business Management and Business Development.

Specific key areas of focus from the Career Development Framework:

- Holds or working towards a recognised Level 5 professional qualification and has a minimum of 4-6 years prior experience in a similar role. Understands the principles of Corporate Governance and its effect on the way the allocated portfolio should be administered.
  - Works collaboratively and is open to learning from others and shares their own knowledge too.
  - Takes ownership of tasks
  - Seeks regular feedback on performance from line management.
  - Manages time effectively
  - Ensures adherence to all compliance procedures
  - Excellent client relationship and interpersonal skills.
  - Experience in MS Word, Outlook, DMS and corporate administration database software (preferably Viewpoint).
  - A strong sense of commitment and responsibility.
  - Excellent verbal and written communication skills including excellent spelling, grammar and punctuation.
  - Sound organisation skills
  - Maintains CPD requirements
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