



We are looking for Semi-Senior and Senior Administrator – Trust Department at Sanlam Trustees International Limited:

Reporting to the Team Leader, you will be responsible to administer the affairs of a portfolio of clients comprising of mainly Trusts and a few Companies (GBCs, ACs, Domestic companies, international companies) in accordance with the Company's procedures and internal control in place.

Role & Key Responsibilities

- To liaise with clients directly as the first point of contact on all routine matters.
- To ensure client requests are met promptly and timely.
- To liaise with bankers, intermediaries, investment advisers, asset managers, lawyers, accountants, brokers, tax advisers, auditors and other third parties, as necessary regarding client affairs.
- To draft resolutions, minutes, agreements and other documents.
- To prepare meeting packs, attend client/trustees/board meetings and draft minutes.
- To arrange for payments on behalf of the entity, correctly and promptly by following necessary compliance procedures.
- Compliance: To ensure the clients are fully compliant in terms of KYCs, transaction monitoring, risk ratings and file review and action points and vis-à-vis the authorities.
- To assist with CRS/FATCA filing.
- To regularly review debtors and recover debts.
- To liaise with investment houses to buy/sell/redeem investments timely and also monitor the performance of investments/investment manager (as per investment reviews results obtained)
- To prepare accounts and investments reports will be a plus. If not, to atleast be able to read and understand the accounts.

Skills and Qualifications Required

- Partly/fully qualified ICSA, STEP, ACCA or any relevant qualification.
- Maintain an awareness of the legal and regulatory framework.
- Understand and apply the Company's compliance policies, procedures and internal controls.
- Good standard of oral and written communication skills.

Candidate Profile

- Diplomacy, discipline and professionalism.
- Self-motivated and have the ability to work under pressure.
- Good time management and ability to multi-task.
- Good attitude.
- Team Player.

If you meet the above profile, please contact Saroja Bundhoo on SarojaB@trustees.sanlam.com and Suraj Pardan on SurajP@trustees.sanlam.com.

Date: 7 December 2023