

Junior Banking Administrator

Job Summary

Reporting to the Head of Banking, we are looking for a proactive and organised Junior Administrator to join our team. This role is ideal for someone at the early stages of their career who is eager to learn and develop strong administrative and basic banking operations skills.

Main Duties and Responsibilities

You will support the team across a variety of administrative and banking tasks, including:

General Administration

- Provide administrative support to the team.
- Manage incoming calls, emails and general enquiries professionally.
- Prepare, format and update documents, reports and correspondence.
- Maintain organised filing systems.

Data Entry & Record Keeping

- Input and update information in internal systems with a high level of accuracy.
- Maintain client records, databases and logs.
- Assist with preparing reports, summaries and basic documentation.

Basic Banking Administration

- Assist with reviewing and processing simple account opening documentation.
- Help carry out basic compliance checks.
- Support the team with logging and tracking payment instructions.
- Help prepare basic payment details under supervision.
- Assist with scanning, filing and organising banking-related correspondence.
- Update internal systems with banking information and status updates.
- Liaise with colleagues to gather information needed for banking tasks.
- Carry out any other reasonable tasks within your skills and abilities.

Person Specification

Education & Qualifications

- Minimum of 5 GCSEs (A-C) or equivalent, including English and Mathematics.
- Graduate level education is helpful but not essential.

Skills & Experience

- Some experience in an office or customer-facing environment is helpful, but full training will be provided.
- Basic understanding of administrative processes; interest in learning banking operations.
- Awareness of compliance requirements such as KYC, AML, CRS and FATCA.
- Confident using financial systems and banking software, with the ability to resolve simple issues.
- Experience with Viewpoint is an advantage.
- Good working knowledge of Microsoft Office (Outlook, Word, Excel).
- Comfortable learning new systems and software.
- Strong written and verbal communication skills.

Personal Qualities

- Highly organised with excellent attention to detail.
- Positive, proactive and willing to learn.
- Able to manage multiple tasks and prioritise effectively.
- Friendly, professional and confident when dealing with colleagues and clients.
- Reliable, trustworthy and able to handle confidential information.
- A strong team player with a flexible approach.
- Carry out any other reasonable duties within your skills and abilities.

This job description is provided only as a guide to assist the employee in the performance of their job. The Firm is a fast-moving organisation and therefore changes in employees' duties may be necessary from time to time. The job description is not intended to be an exhaustive, inflexible or finite list of tasks and may be varied from time to time in the light of changing circumstances after discussion with the postholder.