



Investment Operations Administrator

The Investment sector, as part of the Financial Services sector, specialise in investment management, trading and reporting activities. With the emergence of different forms of active and passive investments, including pensions and impact investing, now is an especially exciting time to work in Investment Operations, due to the vast array of products and services on offer. Operations Support staff work within the operational and administrative areas of businesses, ensuring the back office activity is undertaken following key guidelines, legislation and compliance. With Investment taking many different forms, the activities are varied and may involve institutional or retail clients, and may involve a local, national or a global client base. This could include a range of high-net worth individuals, businesses, collective investment schemes, pension funds, charities, corporations and governments.

An Investment Operations Administrator would typically sit within the Operations department of an Investment institution. Their specialism and focus may vary, but often will include; the stock exchanges, stockbrokers, investment managers, banks, financial advisors and wealth management firms. In this role, it is imperative that an Investment Operations Administrator provide key support to Traders, Brokers and Investment Managers, to ensure effective communication, administrator and clerical activities for the benefits of the firm and their clients.

Programme Benefits and Outcomes

Your Investment Operations Administrator will be able to;

- Develop a range of technical proficiencies, including but not limited to – Reconciliation of investment records, Data entry, Investigating missing or inaccurate data, Compliance and money laundering checks, Researching information towards investigative activities and projects, Processing correspondence.
- Understand how the skills fit your business needs and implement these effectively
- Develop outstanding professional conduct

Nationally and Industry Recognised Qualifications

Alongside the programme, your employees will gain a Professionally recognised qualification to support their development, supporting your organisation in developed a high-skilled workforce.

Continuation Courses for your Employees

TEAM LEADING AND MANAGEMENT

Once proficient in a their role, with the skills, knowledge, behaviours and experience needed to thrive in a highly pressurised financial services environment, our tailored pathway courses support your organisation to further progress employees into higher level roles. We do this successfully through tailoring our programmes to the specific needs of your employees' development, alongside the detailed requirements of your business.

Successful completion of the Investment Operations Administrator programme can lead onto;



Programme Support and Additional Services

Our programmes are developed to support your business needs in developing the talent, skills and knowledge needed to help your business grow and succeed. Our Investment Operations Administrator course also includes the following components;

12 months programme duration

supported through industry recognised qualification

Dedicated Account Manager

monthly meetings to satisfy all your questions, feedback and communication needs

Personalised coach, tutor and assessor

weekly contact for your employees 20% off the job training (face-to-face, virtual and telephone)

Training Costs

Levy businesses can use their contributions to pay for this training. The costs will be £5,000.

If you are not a levy paying business there may not be a cost for this training. If the employee on this programme is under 19 and your business has less than 50 employees, there will be no cost for the training. If they are over 19 and/or your business has over 50 employees then you will contribute 5% towards the cost of the training which would be £250.

Contact us

With Academies throughout the UK, get in touch today to find out how your employees can begin their journey, and how we can support your organisation with your workforce education and training

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