



Designation:	PP3611 - Consultant
Category:	Corp - Direct Consulting
Posted by:	Alexander Forbes
Posted on:	22 Sep 2026
Closing date:	29 Sep 2026
Location:	Sandton

Purpose of the Job:

To provide consulting, administration, and coordination support to the trustees and management committees of employee benefit funds. The role is responsible for assisting in the daily management and operational oversight of funds, facilitating communication between stakeholders, and providing overall support to the Senior Consultant. The Consultant serves as the main client contact in the absence of the Senior Consultant and ensures the effective day-to-day functioning of funds.

Overview:**Minimum Education and Qualifications****Essential Qualifications**

- BCom Degree or BA Law Degree.
- FAIS Accreditation
- Minimum of 2 years' experience in:
 - Employee Benefits Consulting
 - Risk Benefits
 - Investments Consulting

Advantageous Qualifications

- Certified Financial Planner (CFP).
- Chartered Financial Analyst (CFA).

Key Responsibilities**1. Trustee and Management Committee Support**

- Coordinate and prepare trustee, management committee, and ad hoc meeting agendas.
- Compile and distribute meeting packs and supporting documentation.
- Attend meetings, record and distribute minutes within agreed timelines.
- Monitor and follow up on matters arising from meetings.
- Support governance and decision-making processes of the funds.

2. Fund Administration

- Distribute information to trustees, insurers, asset managers, and other stakeholders.
- Process invoices and payments.
- Conduct annual rebroking exercises, including obtaining and analysing quotations and preparing recommendations.
- Manage Section 14 transfer processes and regulatory submissions.
- Assist with annual reports and financial statement preparation.
- Facilitate rule amendments and obtain required client approvals.
- Ensure timely distribution of client reports, surveys, and standard fund documentation.

3. Client and Member Support

- Manage external and client queries via telephone, written correspondence, or meetings.
- Respond to member enquiries and provide support where required.
- Build and maintain relationships with trustees, management committees, and key stakeholders.
- Draft and distribute member communications and informational material.
- Coordinate communication with pensioners and other beneficiaries.

4. Internal Coordination and Stakeholder Management

- Act as a liaison between internal departments to ensure smooth fund operations.
- Coordinate the preparation and distribution of documentation for committee meetings.
- Communicate client instructions, requirements, and issues to relevant departments.
- Ensure stakeholder requests are actioned and resolved within agreed timeframes.
- Maintain accurate records of communication and resolutions.

5. Compliance and Industry Knowledge

- Maintain knowledge of the Employee Benefits industry and investment environment.
- Stay informed on changes to relevant legislation, including:
 - Pension Funds Act
 - FAIS Act
 - Tax Legislation
- Ensure compliance with industry regulations and internal policies.
- Participate in continuous professional development initiatives

6. Team Contribution

- Foster positive working relationships with colleagues and stakeholders.
- Support team objectives and contribute to a collaborative work environment.
- Provide support and backup to the Senior Consultant when required.

Competencies

Leadership Competencies

- Commercial Acumen
- Purposeful Collaboration
- Growing Capability

Strategic Competencies

Customer Connection

- Relationship Building
- Insight
- Advisory Capability

Execution Excellence

- Product Sales
- Service Delivery
- Accountability
- Operational Excellence

People Priority

- Collaboration and Teamwork
- Stakeholder Engagement

Functional Competencies

- Employee Benefits Consulting
- Institutional Sales Skills
- Institutional Solutions Knowledge
- Actuarial Understanding
- Cross-Selling Ability
- Account Management
- Fund Administration

- Regulatory and Legislative Knowledge
- Client Relationship Management
- Communication and Presentation Skills
- Problem Solving and Analytical Thinking
- Planning and Coordination Skills

Behavioural Competencies

- Customer Focus
- Attention to Detail
- Professionalism
- Initiative
- Adaptability
- Time Management
- Continuous Learning
- Results Orientation

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