

# Role Profile

Role title	Executive Assistant to Chief Operating Officer	
Reporting to	Neil Greenwood	
Team	Operations	
Division	Wealth & Investment	
Key relationships	Operations Team	
Regulatory status	Certified person (CP): <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If CP, please confirm:  (i) The type of certified function(s) performed  For guidance see <i>Role descriptions – help with defining Certified Persons</i>	Please tick as many as applicable:  Material Risk Taker (MRT)  Client-dealing function  Requires FCA qualification  Supervisor/manager of a CP	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Qualifications		
(ii) Mandatory professional qualifications and exams (required for the role)	(ii) Mandatory professional qualifications and exams required under the FCA/PRA SMCR rules or prescribed by Investec ( <b>please state N/A if no qualifications/exams are required for this role</b> ): N/A	
Team description	The EA is an integral part of the COO leadership team, which is responsible for all aspects of running Operations as a business covering including cost, risk, performance, people and sustainability. The team oversees the daily service to clients and continuous improvement agenda as well as the longer term strategic direction of the firm and how Operations contributes to that ambition.	
Description of role and key responsibilities	Provide confidential assistance and administrative support to the COO. Key responsibilities include: <ul style="list-style-type: none"> <li>• Complex diary management</li> <li>• Acting as first point of contact for all internal and external stakeholder communication. Fielding and directing email requests where necessary and assisting with incoming inquiries.</li> <li>• Governance Forum / Committee meeting support work i.e. managing dates of meeting and actions, liaising with representatives responsible for preparing papers, preparing agendas, distributing meeting packs and taking minutes</li> </ul>	

	<ul style="list-style-type: none"> <li>• Report writing</li> <li>• Invoice authorisation</li> <li>• Arranging and facilitating team events and Town Halls</li> <li>• Booking travel and accommodation</li> <li>• Maintaining annual leave records</li> <li>• Reviewing and authorising expense claims</li> <li>• Managing ad hoc tasks and management of miscellaneous issues</li> </ul> <p>In addition, the role involves internal communications and engagement strategy and activities, collaborating with colleagues across the Ops team and the wider organisation to build and maintain strong partnerships.</p>
Core skills and knowledge	<ul style="list-style-type: none"> <li>• Strong organisational skills and attention to detail</li> <li>• Ability to develop and maintain key business relationships</li> <li>• Proficiency in Microsoft Office applications</li> <li>• Good PowerPoint skills</li> </ul> <p>Required personal attributes</p> <ul style="list-style-type: none"> <li>• Ability to multitask, prioritise, be proactive and take initiative</li> <li>• Self-motivated</li> <li>• A positive and “can-do” attitude</li> <li>• Team player</li> </ul>
Any other attributes that would be helpful, but not essential for the role.	<ul style="list-style-type: none"> <li>• Strong minute-taking abilities with accurate and fluent writing style</li> <li>• Experience as an Executive Assistant within the banking industry</li> <li>• Experience of working in a fast paced, global environment</li> <li>• Experience of supporting governance forums and committees (preferably in financial services)</li> </ul>

This role description accurately reflects the key responsibilities and associated skills, knowledge and attributes required for to perform this role at this time. It is the responsibility of the employee and manager, to update this profile, (and store against the employee’s record), as responsibilities, required skills and knowledge changes.