

PLACEMENT DESCRIPTION

Employer: WEX TEMPLATES

Contact:

Supervisor:

Employer Tel:

Website:

Job: Fund Management

Classification: Business, Finance and Related

Ref: 13,038

Aims & Objectives: To develop key skills through the experience of work. To gain an insight into working in a bank.

Key Tasks: There are several areas available for students to work in (whenever possible students should inform Careers Teacher which department is preferable, if no preference then a mixed work experience placement may be organized): Fund Administration Compliance Finance PWM (Banking) Custodian Trustee Private Fiduciary Fiduciary Accounting

Requirements: STUDENTS MUST BE OVER 16 FOR INSURANCE PURPOSES. Students MUST be interested in these areas of work. Students should be enthusiastic, willing to learn and able to listen and follow instructions carefully. Students should note that strict confidentiality is required on this placement. Confidence, communication skills, honesty, numeracy and tact are required.

Clothing: Office smart

Working Hours: 9.00am - 5.00pm

Meal Breaks: One hour- lunchtimes may be unsupervised

Interview Required: Y

Student to Arrange: Y

Notes: Student to contact employer to arrange an interview / informal chat prior to starting the placement.

Employer's Health & Safety Risk Assessment:

EQUIPMENT & MACHINERY, CHEMICALS & FLAMMABLE MATERIALS:-Students will use some office equipment such as a paper shredder, photocopier etc. after training. Student will not come into contact with chemicals or use hazardous machinery in this placement.LACK OF KNOWLEDGE, EXPERIENCE & AWARENESS:-Students will be supervised at all timesSLIPS, TRIPS & FALLS:-Students will have no reason to work at heights.LIFTING & MANUAL HANDLING:-Safe manual handling will be shown if required during the week.ELECTRICITY:-Safe use of electrical items to be shown.COMPUTERS & WORK STATION:-Regular breaks from computer screens are required during prolonged use.

Special Notes:

Parents/Guardians will be expected to give details of any health problems e.g. epilepsy, asthma etc on the agreement form

Last Visit Date:

Next Visit Date:

Risk Band: L