

## PLACEMENT DESCRIPTION

**Employer:** WEX TEMPLATES

**Contact:**

**Supervisor:**

**Employer Tel:**

**Website:**

**Job:** Mortgage and Investment  
Administrator

**Classification:** Business, Finance and Related

**Ref:** 50,011

**Aims &  
Objectives:**

To develop key skills through the experience of work.  
To gain an insight into working within a company that offers financial services such as savings accounts and residential mortgages.

**Key Tasks:**

Student will do a certain amount of observation then with training and under supervision may do simple tasks such as filing, inputting, scanning and assisting with mortgages and investments.

**Requirements:**

Numerate with a genuine interest in this area of work.  
Confident and outgoing with a pleasant manner.  
Good communication skills and able to work as part of a team.  
Ability to use a computer confidently.

**Clothing:**

Smart office wear (suit, shirt and tie). Dress down on Friday

**Working Hours:**

Monday Friday 9am 5pm (not more than 37hrs per week)

**Meal Breaks:**

1 hour for lunch unsupervised and may be taken off site

**Interview  
Required:**

Y

**Student to Arrange:**

Y

**Notes:** Student to contact employer to arrange an informal meeting prior to placement.

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**Employer's Health & Safety Risk Assessment:**

LACK OF KNOWLEDGE, EXPERIENCE & AWARENESS: Student must be supervised at all times.

SLIPS, TRIPS & FALLS: Student must not work at a height where there is a possibility they may fall..

LIFTING & MANUAL HANDLING: Student must be taught safe lifting and handling where necessary.

EQUIPMENT & MACHINERY, CHEMICALS & FLAMMABLE MATERIALS: Student will not come into contact with hazardous machinery or chemicals

CHILD PROTECTION ISSUES:

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**