

JOB DESCRIPTION

Job Title	Membership Documents Coordinator
Department	Membership
Responsible For	Ensuring company obligations are met by Principal, Partner and Director members.
Job Grade	7
Reports to	Membership Documents Team Leader

Job Purpose:

The focus of the role is to identify the actions that PPD (Principal, Partner or Director) members and PPD applicants are required to undertake to meet the company obligations required by the Propertymark Conduct and Membership Rules, and to ensure that they meet them.

Main Duties and Responsibilities:

- To identify the company responsibilities relevant to PPD members' and PPD applicants' divisions:
 - Make appropriate verification checks for organisations and PPDs, including company checks, legal entity checks, and full PPD checks. Record information received accurately on the membership database.
 - Write to PPD members to obtain company declarations, validate these, compare information with results of full PPD checks as necessary and record the resulting information on the database.
 - Make assessments of the client money handling status of PPD members' firms based on company declarations and other relevant information.
- To request, obtain, validate, record and maintain records of evidence of PPD members' and PPD applicants' compliance with membership requirements for their companies. This includes: professional indemnity insurance, CMP, and accountant's reports.
 - Write to PPD members and new PPD applicants to request provision of documents.
 - Validate and record on the database company membership documents received including scanned copies of these.
 - Accurately record CMP levy payments including to investigate and resolve CMP payment queries and anomalies.
 - For new PPDs, applicants and on an ad-hoc basis, obtain evidence of independent redress, registration with HMRC for Anti-Money laundering, and RICS, or law society regulation.
- Take appropriate action where documents received do not meet Propertymark Conduct and Membership Rules requirements:
 - To return invalid, inaccurate or incomplete documents to members/applicants with requests for amendment or further information where necessary.
 - For new applicants to PPD membership, review qualified accountant's reports (including CASP reports). Consult with the Regulation Department when necessary to assess breaches and decide on any further action to be taken, including possible withdrawal of application. Write to request additional information or action required because of qualified accountant's reports.
 - Identify qualified accountant's reports, and those with a 30% or greater drop in total client funds since the previous report. Forward these reports to the Regulation Department for further action.
- General office administration:
 - Keep accurate records of correspondence.

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- Answer telephone enquiries and reply to email enquiries received by the Membership Documents section.
- Other duties for the Membership Department as required.
- Process documentation
 - Record current processes for duties undertaken within the role.

Key working relationships:

- Members and potential members
- Membership Documents Supervisor
- Membership Manager
- All other departments

Job Requirement / Skills

- Working knowledge of Microsoft office
- Excellent Customer service skills
- Excellent oral and written communication skills
- A basic understanding of legal entities is desirable
- Experience with customer relationship management (CRM) systems

Education / Experience:

- Level 2 in Business Administration or equivalent
- GCSE in Maths & English or equivalent
- Business administration experience
- Membership body experience desirable