



Sun Life Financial® ADMINISTRATOR FATCA & CRS

Sun Life Assurance Company of Canada is a leading financial services organization, with an excellent reputation for customer focus and innovation in all of its markets. The Bermuda operations were established in 1995 to offer life insurance annuity and investment products to global high net worth individuals.

Reporting to the Manager, Quality Assurance and Training, the primary purpose of this position is to review and analyze entity and individual client tax residency certification forms and classify these account holders under various tax regulations pursuant to the U.S. Foreign Account Tax Compliance Act and the OECD Common Reporting Standards. This position will also be responsible for assisting the Manager in delivering training programs and for performing various tasks relating to the annual reporting of accounts to the Bermuda Office of Tax Commissioner. The incumbent will be responsible for working with other customer services representatives, client relationship managers and distribution teams to deliver an exceptional client experience and quality services.

During the first two years, the person will spend a considerable amount of time building their knowledge base about various Tax regulations and agreements signed by the Bermuda Authorities and is expected to become a subject matter expert in these requirements as they apply to an insurance company. ***For a copy of the full job description, email hr@psolutions.bm or call 232-5270.***

Key Skills, Education & Experience Requirements

- An undergraduate degree. (the equivalent in relevant work experience will be considered)
- At least four years relevant experience with a minimum of one year of direct experience working in a bank or financial institution with responsibility for carrying out due diligence review under Anti-Money Laundering regulations including on-boarding new accounts in compliance with the U.S Foreign Account Tax Compliance Act and other Inter-Governmental Agreements signed between various countries.
- An understanding of complex trust structures is desired.
- ACS Certificate (LOMA Customer Service Certificate). If candidate does not hold their ACS, they will have 12 months to obtain certification.
- Prior experience building training materials relating to tax regulations in compliance with the Bermuda regulations.
- Past experience learning multiple IT systems and business processes. Proficiency in the use of MS Office (Word, Excel, PowerPoint, Visio).
- Candidates should be inquisitive, analytical and problem solvers able to come up with innovative solutions to increase customer engagement. Strong presentation and communication skills including the ability to be direct in a positive, constructive manner are also essential.
- The ability to document procedures and policies and operational business flows as well as the ability to communicate these across a variety of audiences.
- Candidates must be organized; highly motivated; quality and detail oriented. Must have a strong sense of team commitment, be able to adhere to tight deadlines and possess excellent follow-through.
- Strong customer service skills with the ability to collaborate effectively with internal and external customers. Multi lingual is preferred.
- Experience working in multi-cultured, multi-language and across multiple time zones is preferred.

Please apply in writing no later than February 26, 2016, to:-

Performance Solutions Limited

Suite 350, 48 Par la Ville Road, Hamilton HM 11

Email: hr@psolutions.bm. Fax 441-232-9491 Phone: 441-232-5270