



# Savings Administrator

June 2026

Charity  
bank

# About Charity Bank

**Charity Bank is the loans and savings bank for people who want to make the world a better place.**

Our vision is for a society that fosters vibrant communities and a healthy planet, giving every individual the opportunity to thrive. Charity Bank is 'of the sector and for the sector', 100% owned by charities and social purpose investors and dedicated to supporting UK charities and social purpose organisations.

We use our savers' money to make much needed loans to enterprising organisations working to create lasting social change in communities across the UK. Since 2002, we have used the money saved with us to provide over £630 million of loan finance to a wide range of organisations across the arts,

community, education, environment, faith, health, housing, regeneration, social care and sports sectors.

Our loans are used for a wide range of purposes, from providing accommodation for vulnerable refugees to action sports centres for young people looking for a safe place to skate to residential and respite care centres for those with profound disabilities.

Our co-workers are inspired by the organisations that we support and highly motivated to better equip these charities and social enterprises to help the disadvantaged, enrich lives and make our communities better places to live.



Charity Bank borrower,  
Magpas Air Ambulance.



Charity Bank borrower,  
Kent Wildlife Trust.

# Why work for us?

**No matter what your role is at Charity Bank, you will be making an essential contribution to the positive social value creation that is the very reason for Charity Bank's existence.**

For every loan that we make and the impact that this has on the organisations we lend to and the people that they serve, we can all say, "Wow, look what we helped to create!"

If your values align with Charity Bank's, the role matches what you are looking for, and our mission and work excites you - we invite you to apply to join us!

## Equality, Diversity and Inclusion

At Charity Bank, we want our team to reflect the diverse communities, organisations, and people that we work with. We are committed to being an inclusive employer and great place to work and we strongly encourage applicants from diverse backgrounds to apply.

We have implemented policies to support this aim and are proud to offer flexible working practices and a caring culture. If you need any reasonable adjustments for any part of the recruitment process and/or working environment, please let us know, in confidence, so we can discuss these with you.



### Values

**Working in harmony**

**Mutual respect**

**Being the change**

# Role Profile

<b>Job Title:</b>	Savings Administrator
<b>Contract:</b>	Full-time
<b>Location:</b>	Tonbridge
<b>Responsible to:</b>	Head of Savings Operations
<b>Date:</b>	June 2026

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## Overall Purpose of the Role:

Support the Savings Team in achieving objectives and activities in a high-volume environment. Deliver outstanding service to the Bank's savers, processing deposit administrative tasks efficiently and in accordance with the Bank's policies & procedures.

## Key Contacts

- Internally – Work closely with a broad range of staff, including liaison with Compliance, Lending Services and Finance colleagues on banking matters.
- Externally – Work closely with a broad range of external parties including our savers and general enquiries coming into Charity Bank.

## Other Requirements:

- Some requirement for out-of-normal-hours working, in times of heavy workload within the team.

## Key Accountabilities - Savings Administrator

### 1. Customer handling:

- Ensure that saver account requests are promptly receipted and actioned and that general enquiries are responded to in a timely manner whether by telephone, letter or email.
- Take account of Data Protection rules and regulations and ensure that customer confidentiality is maintained.
- At all times work within the Conduct Risk & AML framework including Consumer Duty.

### 2. Deposit accounts:

- Complete manual Anti-Money laundering checks for organisations and review outputs for individuals when electronic checks are carried out via the online origination platform.
- Support the opening of new account applications received via the online origination platform.
- Process postal applications on Auris (core banking platform), electronically scanning account forms, ensuring there is a clear audit trail and that transactions are compliant with the Bank's policies and a right first-time culture is achieved.
- Process account maturities, closures or withdrawals and assist with maintaining appropriate audit records.
- Process deposit accounts credits received by cheque or electronic payment.

- Review all transactional processes and make informed suggestions leading to continuous improvement in best practice.
- Support deposit raising campaigns.

### **3. Banking:**

- Enter deposit data into Aurius, meticulously conducting account reconciliations and investigating any unusual items; generate accurate reports from the banking system and bespoke databases.
- Monitor your daily work volumes and prioritise tasks to ensure the departmental service level agreement is met.
- Document and test new products and procedures, working with IT. Create inserts for the department manuals.

### **4. General Operations:**

- A main point of contact for incoming telephone calls, responding or re-routing them as appropriate.
- Liaise and cover for reception, ensuring that the incoming post is opened and distributed quickly; frank outgoing post, including the banking of cheques.
- Provide detailed management information about the savings portfolio as and when required.
- Ad hoc office administration including filing, scanning, cleansing data for marketing campaigns and data entry.
- Prepare and issue mail merges via email or postal means.

# Person Specification

## Experience (Essential)

- 5 years customer service experience gained within a financial services environment
- Knowledge of administrative procedures and practices
- Data entry

## Experience (Desirable)

- An understanding of savings products
- Use of mail merge
- Document writing
- Knowledge of banking processes and systems

## Attainments (Essential)

- Educated to at least GCSE standard including equivalent A-C grades in Maths and English
- Good standard of written and oral English
- Confident telephone answering manner

## Attainments (Desirable)

- Customer service diploma
- A-level Maths

## Special Aptitudes

- High degree of work accuracy and attention to detail with an analytical approach
- Excellent communication skills, both verbal and written, with good knowledge of MS Office; Outlook, Word, Excel
- Numerate
- Team player
- Keen to learn

## Disposition

- Able to work with minimal supervision
- Passionate about providing excellent service
- Keen to resolve any service issue, process challenges or expressions of dissatisfaction from savers
- Ability to prioritise and manage workload in an ever-changing environment with any regulatory, operational and IT changes
- Driven to achieve and progress

## Thinking Style

- Organised and methodical

## Circumstances

- Able to work additional hours on occasions when volumes or deadlines dictate

# The Four-Day Week

## Redefining Work-Life Balance

At Charity Bank, we prioritise the well-being of our team members alongside the pursuit of our social mission. The Charity Bank four-day week is an innovative initiative that sets us apart in fostering a thriving workplace culture.

## Why the Charity Bank Four-Day Week?

Our belief is simple: a supported and motivated team delivers exceptional customer service and propels us toward our social goals. By offering all staff the opportunity to work four days a week with full-time pay, we prioritise a healthy work-life balance, boost morale, and enhance overall job satisfaction.

## How it works

Our four-day week consists of 32 hours, typically spread across four eight-hour days, allowing employees the flexibility to choose either a Friday or Monday as their day off.

Days off are protected and treated like weekends, ensuring uninterrupted personal time. The arrangement is flexible, adapting to part-time employees on a pro rata basis.

## Commitment to Productivity and Continuous Improvement:

The four-day week is not merely a benefit but a mutual commitment. In exchange for increased productivity, we challenge established ways of working, constantly seeking opportunities to improve processes and enhance efficiency across the team and organisation.

## Key Features:

- 1. Work-Life Balance:** Our four-day week promotes an improved work-life balance, granting more time for personal pursuits, family, and self-care.
- 2. Full Pay:** Despite fewer hours, employees receive equal compensation, recognising and rewarding their commitment.
- 3. Productivity Boost:** The strategic four-day week enhances productivity, with studies showing increased focus, creativity, and efficiency.
- 4. Equality and Diversity:** Our four-day week and flexible working policy align with our goal of fostering an inclusive and positive employee experience. We actively promote equal opportunity, attract diverse talent, and support personal growth.
- 5. Social Mission Support:** Prioritising team well-being empowers contributions to our social mission, creating a positive ripple effect for both employees and the communities we serve.

For more information and FAQs, visit [www.charitybank.org](http://www.charitybank.org). Join us in redefining the workplace and making a lasting impact.



# The benefits

In addition to salary Charity Bank offers a generous benefits package.

- **Annual Leave** - 160 hours per annum plus bank holidays, pro rata in year of joining (and also for part-time), with the opportunity to increase to a maximum of 192 hours per annum (pro rata)
- **Four Day Week** - supporting work-life balance
- **Free access to online 24/7 GP** and Second Medical Opinion service
- **Employee Assistance Programme** - Health/Work/ Life concerns 24/365
- **Perkbox** - employee discounts and deals to help save money
- **Contributory Pension Scheme** - auto enrolment in place
- **Life Insurance** - 4 x salary paid to beneficiaries if death in service
- **Private Medical Cover**, subject to eligibility criteria
- **Enhanced absence payments** - including maternity, paternity, adoption, shared parental leave, and sickness, subject to eligibility criteria
- **Give as You Earn Scheme** - charity donations of up to £250 per annum are matched by Charity Bank
- **Additional Annual Leave Purchase Scheme** - up to 32 hours per annum (pro rata) to a maximum of 224 hours per annum, (pro rata)
- **Electric Vehicle Lease (Salary Exchange)** - Go green and save on Tax and NI. Subject to eligibility criteria.
- **Group Income Protection**
- **Car or Season Ticket Loan Scheme**
- **Cycle to Work and Cycle Loan Scheme**
- **Computer Loan Scheme**





PROD. CHARITY BANK - LEIGH

ROLL

SCENE

TAKE

DIRECTOR:

JUSTIN TAGG

FPS 24

CAM.

G. MACGREGOR

RESOLUTION  
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The Charity Bank Limited, Fosse House,  
182 High Street, Tonbridge, TN9 1BE.  
Company registered in England and  
Wales No. 4330018. Authorised by the  
Prudential Regulation Authority and  
regulated by the Financial Conduct  
Authority and the Prudential Regulation  
Authority. Financial Services Register  
No. 207701. Member of the Financial  
Services Compensation Scheme (FSCS).

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Charity Bank borrower, Leigh  
Miners Rangers.