

ROOCRUIT

# JOCELYN

## Senior Project Administrator & Operations Professional

Cape Town, South Africa

### PROFESSIONAL SUMMARY

Highly experienced and versatile Senior Administrator with a strong background in financial services, project management, and content creation. Proven track record in high-level client servicing, operational efficiency, and complex administrative oversight within remote environments. Possesses a Bachelor of Commerce and a post-graduate qualification in Project Management, combining analytical rigor with exceptional communication skills.

### KEY SKILLS

- Project Management (Magna Cum Laude)
- Client Relationship Management (CRM)
- Financial Administration & Compliance
- AML & FICA Regulatory Checks
- Content Creation & Instructional Design
- Asana, Slack, Salesforce & MS Office
- Digital Database Management
- Strategic Scheduling & Logistics

### PROFESSIONAL EXPERIENCE

#### Independent Boutique Financial Planning Firm

March 2009 – Present

*Senior Administrator / Assistant*

- Key role in the business set-up and operational transition during firm founding.
- Provide comprehensive support to managers, including meeting preparation, minute-taking, and complex travel arrangements.

- Manage full-cycle client onboarding, investment administration, and proactive issue resolution for high-net-worth clients.
- Oversee AML and compliance reporting, ensuring all regulatory requirements are met and updated within the CRM.
- Coordinate client events and manage the digital database to ensure 100% data integrity.
- Responsible for client invoicing and the production of detailed management and compliance reports.
- Maintain rigorous follow-up systems to ensure project milestones are met across the team.

### **International Language Education Provider**

**February 2019 – Present**

*English Language Trainer & Content Specialist (Remote)*

- Deliver specialized professional English instruction to international students.
- Develop bespoke educational content, including vocabulary and grammar modules for specific industries.
- Assess and grade written work, providing comprehensive feedback and designing final examinations.

### **Global EdTech Content Platform**

**April 2018 – August 2019**

*English Content Creator (Remote)*

- Engineered high-quality curriculum content for international exams including IELTS, TOEIC, Cambridge, and TOEFL.
- Developed instructional exercises and digital learning tools aligned with strict pedagogical outcomes.
- Managed high-volume output under tight production deadlines.

### **High-Net-Worth Investment Management Firm**

**January 2008 – March 2009**

*Analyst*

- Supported two senior financial planners in managing portfolios for high-net-worth individuals.
- Handled all documentation and administration related to portfolio changes and FICA compliance.
- Managed executive diaries and facilitated high-level client service standards.

**International Online Education Agency****May 2017 – August 2017***Corporate English Instructor (Remote)*

- Provided one-on-one Business English training to corporate professionals.
- Utilized the CEFR framework for student grading and assessment.
- Conducted original content creation for diversified student needs.

**EDUCATION****Bachelor of Commerce (Economics & Politics)**

University of Cape Town | Graduated 2004

**Project Management Course**

Completed 2022 | Graduated Magna Cum Laude

**Web & Graphic Design Certification**

The Graphic Design School, Australia | Completed 2014

**CERTIFICATIONS & TECHNICAL PROFICIENCY**

- **TEFL Certification:** English Language Teaching (Inlingua) - B+ Aggregate.
- **Software:** Adobe Creative Suite (CS6), WordPress, basic HTML/CSS, Salesforce, Asana, Slack, Google Workspace, Microsoft Office Suite.

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This candidate is pre-vetted by RooCruit. Contact us for interview scheduling and full references.