

Curriculum Vitae

Personal Information	
Full name:	Dorathy Catherine Paice (Miss)
Nationality:	South African / British
Languages:	English, Afrikaans – fully bilingual
Licence:	Code B
Telephone:	082 975 0487
E-mail:	paicedorathy@gmail.com

Summary

Experienced office professional with excellent organisational skills and proven ability to accurately complete high workloads within strict deadlines and with strong administration, secretarial, legal and project experience. In addition to the skills summary provided below, please review my employment history for detailed abilities. I am accustomed to working closely with management, as a team player and also individually with minimal supervision.

Skills Summary

- Excellent written and verbal skills (including spelling and grammar) and report/letter writing abilities
- Excellent, accurate typing (75-102 w.p.m.) both audio (digital/tapes) and copy typing
- Excellent research capabilities
- Advanced computer proficiency, including MS Office, Internet, in-house databases and programmes (including Crystal Reports, AWD, Quintus, Fiscus, Obelix, IMS4, Case Management Systems (e.g. Axxia, OnTime))
- Comfortable liaising with people from all backgrounds, including Management and Executives
- Accurate editing and proofreading with meticulous attention to detail
- Staff training
- Fast learner, especially technologically
- Ability to multi-task
- Adaptable
- Reliable and honest
- Comfortable running my own portfolio of projects and/or providing support
- Administrative/P.A. tasks such as faxing, filing, posting, arranging meetings/flights/holidays, etc.

Employment History

Dec 2023 to present Self-employed and studying towards courses for TEFL and TEYL (now completed).
Writing a novel and poetry for publishing offshore.

Oct 2013 to Nov 2023 **Estate Late/Legal Administrator (Estate Late Investment Claims) (+10 years)**
Section 37C Estate Late Specialised Administrator (+5 years)
III-Health Claims Administrator (±2 years)
Fire Marshall

Ninety One (Pty) Ltd (formerly Investec Asset Management)

- Administering estate late claims (across all company products) and in line with current Legislation.
- All administrative functions (including system updates, checks, allocation, Quality Control of all documentation and requirements fulfilments (strict regulations).
- Verification of Death statuses via Home Affairs.
- Tax related queries and issuing Tax Certificates.
- Fulfilling Tax Simulation requests (internally as well as to any external parties involved with the deceased's estate).
- Telephonic queries (Estates Call Centre duties).
- Liaising with Financial Advisors, Executors, agents, internal Advisors, new Investors, law firms etc. in order to obtain the relevant legal documentation and information to

allow for capturing and releasing of funds to beneficiaries – including obtaining and verifying identification of payees.

- Verification and confirmation of bank accounts and preparation of instructions on payments to be made to relevant beneficiaries/Trusts etc. Via both available AVS'es and liaising directly with Banks.
- Liaising with internal departments regarding received instructions and captured deals.
- Daily monitoring of volumes and queues whilst remaining within cut-off times set in the Service Level Agreement with our customer and events calendar.
- Maintaining up-to-date information on all cases and progress.
- Dealing with a variety of different legal and business rules and processes on different investment products in order to manage claims.
- Receipt and overseeing of Estates Inbox and management and/or distribution of queries and complaints as appropriate.
- Working within strict turnaround times on follow-ups, as well as responding to queries via phone, email, case history etc.
- Receipt and overseeing of main email Inbox and distributing queries and emails to relevant parties.
- Training new staff members, including new Managers and Team Leaders as Senior Administrator (and with experience gained over the years) - especially as the majority of processes, letters and systems used, had been put in place by myself and were used throughout the company (including in the Training Department, as well as by external Financial Advisors (clients)).

Section 37C Death Claims Administrator (Pension Funds)

Duties in line with those mentioned above, with addition/changes to the role, as follows:-

- Researching and tracing (including appointing external Tracers) of possible dependants (known to Executors/Agents/family of deceased, regardless of nominated beneficiaries on Retirement products, in line with Section 37C of the Pension Funds Act. Liaising with all dependants to establish their financial positions, levels of dependence on a late member; amount of time they might have remained dependent for; level of education; employment statuses and other background information in order to establish appropriate allocation of funds and entitlement to the same.
- In instances of unnatural deaths, liaising with the South African Police Service or in medical instances, liaising with Doctors/Hospitals/Surgeons in respect of causes and circumstances surrounding passing and whether foul play was suspected. Obtaining Post Mortem Reports and reviewing the same for information. Remaining in contact with the SAPS in instances where criminal proceedings were brought against individuals who stood to benefit from any funds.
- Following all my findings, I would prepare a recommendation wherein the entire background of the deceased was laid out, all information regarding dependants/possible dependants/nominated beneficiaries/Trusts and information on these entities, as mentioned in point 1 above and then providing my recommendation on to whom and, in what proportions the deceased's pension funds should be distributed whereafter I would present my recommendation to a Board of both internal and external Trustees (5x) for their independent consideration of information submitted and their approval.
- Obtaining and reviewing L&D accounts.
- Obtaining FICA documentation and obtaining all relevant documentation in respect of Trusts as beneficiaries.
- Issuing instructions to release payments following successfully met requirements.
- Preparing monthly reports with number of cases pending and current stance including progress made; number of new cases; number of approved cases and number of closed cases which were reported on to the Trustees and the Principal Officer of Investec Asset Management (later Ninety One) in a monthly Trustees' meeting.

III-Health Claims

- Obtaining relevant information in respect of client's condition/disability. Verifying and liaising with Doctors/Hospitals/Surgeons/Psychiatrists/Psychologists/Occupational Therapists in respect of client's condition/s and establishing level of illness/disability; possible duration; recovery prospects and the like.
- Compiling information and findings into a Recommendation for submission to the Board of Trustees of the Fund (independent Trustees of the Fund) for their consideration on my findings and approval on my determination on whether a client's claim should be approved or dismissed.
- Doing further investigations/research in the event of queries by any of the Trustees, if needed and then requesting further information etc.
- Once approved by Trustees, relevant documentation would be obtained in order to finalise payment to client and closing of claim (procedures followed in line with such).
- Preparing monthly reports with number of cases pending and current stance including progress made; number of new cases; number of approved cases and number of closed cases which were reported on to the Trustees and the Principal Officer of Investec Asset Management (later Ninety One) in a monthly Trustees' meeting.

As previously briefly stated above - during the course of my employment, I performed additional tasks, using my experience as Secretary/PA and editing, designing and creation, as well as having been exposed to numerous different systems, both in SA as well as in the UK, to provide an idea and giving input in the design of an entirely new system to use for the Department (having taken the entire process over to a digital system). I designed templates, letters, training modules, quick guides, easily accessible folders and maintaining links to documentation for easy access for colleagues (and kept the same up-to-date) to simplify tasks and accelerate everyone's performance. I did research on Unclaimed Benefits Processes with external companies.

The above were submitted, approved and implemented by various Departments, approved and implemented by the Principal Officer of Investec Asset Management (later Ninety One). I also performed other tasks not within my job description – especially to support Managers.

The training department also used my guides and presentations in their training processes.

Financial Advisors/Brokers were also handed some of my letters, templates and guides in order to assist them with obtaining relevant information and documentation from their clients to facilitate smoother handling/assistance as Estate Late procedures and requirements are often misunderstood and are quite specialised.

May 2013 to
Sept 2013

Editorial Assistant

Trademax Publications

- Sourcing editorial content for specialised trade publications.
- Proofreading and editing of articles and features pre-publication.
- Consolidating accounts and recouping outstanding payments.
- Cold-calling potential clients for advertising sales.
- Assistance to Editor as and when needed (flights and hotel bookings, arranging of appointments for Sales Representatives, marketing letters: writing, proofreading before submitting for magazine printing).

Jan 2011 to
May 2013

Researcher/Project Coordinator

Projects IQ (aka Mining IQ)

- Conducting a variety of complex and independent specialist investigations into all mining projects throughout Africa, owned and/or operated by Mine Owners throughout the world.
- Maintaining up-to-date information through frequent liaison with top Executives at Mining Houses, Engineering and mining supply firms while researching and verifying information on mining projects in a large, self-managed project portfolio.
- Researching, updating and maintaining own project portfolio of some 240+ mining projects from initiation to being operational mines, and keeping the most up-to-date

information according to strict turnarounds by phase ("information" i.e. locating, researching and adding new projects on the Company's live database, with continual review and updates of existing projects' development). Daily review of various media sources for information before interpreting and formulating information (writing and adding own project information for capture according to researched information).

- All administrative duties for my own portfolio as well as where needed within the company.

Aug 2010 to
Dec 2010

Project Administrator (Contract position)

Silica Financial Administration Solutions, Grayston Office Park, Sandton

- Updating of project documentation including risk logs, change control logs etc. and assisting Project Managers with project coordination.
- Scheduling and attending meetings, taking the Minutes (and other relevant documentation) and distributing such within specified timeframes.
- Following up on action items from meetings.
- Ensuring project methodology was enforced and adhered to.
- General project coordination and tracking.
- Maintenance of Project Office Calendar.
- Quality Assurance (proofreading and editing) of Company documentation according to strict, specified standards, PRIOR to any letters/documents/communication was sent out from the Company, to any person/s and/or companies.

Feb 2010 to
Aug 2010

Legal Administrator (Estate Late Investment Claims) (Temporary, contract position)

Silica Financial Administration Solutions, Grayston Office Park, Sandton

- QC, processing and authorising transfers and maintenance deals accurately and timeously, including requesting of further information in order to finalise instructions.
- Investigating any backdates resulting from errors.
- Liaising with all teams regarding received instructions and captured deals.
- Daily monitoring of volumes and queues whilst remaining within cut-off times set in the Service Level Agreement and events calendar.
- Resolving all queries within specific turnaround times.
- Providing management with regular feedback.
- Testing of new/enhanced systems.
- Training new team members.
- Checking compliance monitoring reports and reviewing health check reports after daily business run.

Please refer to Ninety One/Investec Asset Management position as this was the same role but with different processes and physical desk-based approaches at the time, which I performed on a contract basis.

Jan 2008 to
Feb 2010

Personal Assistant

Assisted two (Pty) Ltd's Owner with P.A. duties and others:-

1. I.T. and Security Installations (CCTV, maintenance – Campus Square, Bryanston)
 - Logs, invoices, completion, payments and required assistance.
2. Party Bus
 - Marketing and advertising.
 - Arranging functions (transportation to and from (e.g.) rugby matches etc.).
 - Booking venues.
 - Issuing tickets/entry.
 - Ordering refreshments and catering.
 - DJ'ing (compiling playlists according to clients' (possible) interests and requests).
 - MC'ing.

Clients such as Coca-Cola Company (*although not name-dropping with other previous positions*).

Apr 2007 to
Dec 2008

Legal Secretary

Argent Liability Adjusters, Watermead Business Park, Leicestershire, LE7 1PF, UK

- Producing investigation reports, correspondence, memos and other liaisons between various Solicitors and adjusting companies dealing with personal injury/loss claims, preparation and typing of Witness Statements using a digital Case Management System.
- Audio (digital) and copy typing of all required documentation for three Adjusters.
- Basic administrative duties (copying, filing, posting, scanning, faxing, emailing, ordering stationery) and reception duties.
- Overseeing daily running of office, including smooth running of electronic equipment.
- Compilation and uploading of Adjusters' daily timesheets.
- Arranging meetings and lunches at different venues.

Returned to RSA due to unforeseen circumstances in August 2008 and resigned for permanent return to RSA.

Jan 2007 to
Apr 2007

HR Assistant

Nottinghamshire Forensic Mental Health, Arnold Lodge, Leicester, LE5 4ED, UK

- General administrative duties, including reception.
- Compilation and distribution of Job Application Packs to applicants.
- Telephonic liaison with prospective applicants.
- Maintenance of all employees' personal information on in-house system.
- Occasional assistance with interviewing of applicants and completing background and police checks.
- Ensuring staff files were maintained with current information in respect of duties (interchangeable), performance, task fulfilments and other reviews, where necessary/requested.

Aug 2006 to
Nov 2006

Legal Secretary

Weightmans Solicitors, Peat House, Waterloo Way, Leicester, LE2, UK

- General administrative duties.
- Secretarial support to two Fee Earners.
- Digital audio typing of correspondence between Solicitors, Insurers, Insured Parties and Courts.
- Drafting and editing reports (e.g. Case Strategy Reports) and Fee Notes.
- Entering key dates, opening and closing files (both paper and digital) and generating documentation/correspondence via Case Management System (Axxia) including:
 - Generating Court forms
 - Acknowledgement of Service
 - Witness Summons
 - Payments into Court
 - Allocation Questionnaires
 - Certificates of Service; and
 - Preparation of Court documentation:
 - Witness Statements
 - Defences
 - Consent Orders
 - Counter Schedules of Loss
 - Listing Questionnaires
 - Pre-trial Checklists
 - Disclosure Lists
 - Instructions to Counsel.

- Mar 2006 to
Aug 2006 **Word Processing Operator (WPO)**
Mattioli Woods Pension Consultants, Grove Park, Leicestershire, UK
Busy role in expanding company.
- Transcription, audio and copy typing of:-
 - Deeds, consultancy letters, correspondence and timesheets of Pension Fund Administrators.
 - Administrative duties (faxing, filing, copying, scanning, post/email).
 - All typing requirements for five Administrators as well as providing cover for other teams' WPOs.
 - Arranging sales meetings.
- Apr 2003 to
Mar 2006 **Legal Audio Typist/Staff Trainer**
Department of Constitutional Affairs, Immigration and Nationality Directorate (UK)
A very demanding role,
- Typing Judges' determinations on immigration, asylum and visa applications post appeal and Hearings.
 - All typing spot-checked for accuracy, of which a minimum level of 98% had to be maintained at all times.
 - Working to strict deadlines and to daily targets with set rules and guidelines for different counties and Judges.
 - Work evaluated prior to being handed to professional Proofreaders for checking (*to a scoring system*) before being returned to Judges.
- Staff Trainer:**
- Compiling and maintaining relevant training materials and course contents for new staff as well as providing training and support as they settled into their new positions.
- After leaving this post I was invited back to assist with backlogs – additional work over weekends whilst permanently employed to Mattioli Woods.*
- Nov 2002 to
Apr 2003 **Medical Secretary**
NHS Mental Health Services for Older People, Leicester, UK
- Telephonic liaison with patients.
 - Typing and producing of Medical Assessments (audio and copy typing).
 - Typing and posting of all medical letters (to GPs, Psychiatrists and Psychologists and patients).
 - Printing and monitoring staff (Psychologist's, Occupational Therapists', Doctors' attendance registers.
 - Administrative duties (faxing, filing, copying, scanning).
- Apr 2001 to
Aug 2002 **Branch Secretary**
FirstRand Bank of Southern Africa Ltd, Rosettenville Branch, Johannesburg
- Reception, switchboard and administrative duties (faxing, filing, copying, scanning, post sorting and sending as well as email correspondence).
 - Basic PA duties to Branch Manager (arranging meetings, booking venues).
 - Typing of all outlet documents: letters, reports, daily register.
 - Compilation of draft Financial Reports.
- Jan 1998 to
Mar 2001 **Word Processing Operator/Secretary**
First Factors, FirstRand Bank Ltd, Head Office, Bank City, Johannesburg
- Reception and administrative duties (faxing, filing, copying, scanning, post/email).
 - Secretarial support to six managers, 79 credit controllers/clerks (including corporate communications such as memos, offer and rejection letters, final notices).
 - Compilation, printing and distribution of several departmental reports including supplier lists, mailing lists, month-end reports and notices.
 - Printing, editing and review of monthly staff attendance register.

Please note:

During my residency within the UK, I filled extra roles/temporary roles as per “ways of working”. Roles were temporary and swift. There are a few positions I had, outside of my “usual” roles, which are not mentioned as they were short-lived. I would be happy to discuss these during interview.

Training/Courses/Achievements

1993 to	Hoërskool Die Fakkel, Carter Street, Forest Hill, Johannesburg, S.A.
1997	Afrikaans, English, Maths, Economics, Business Economics, Typing (Distinction/Trophy)
Matric RSA (GSE)	Certificate of Achievement (Typing Olympics RSA) – Academy of Learning (1997).
Nov 1998	Microsoft Word – Connie Jonck Consultants CC
1999	Basic Credit Control Techniques
2001	Customer Interaction Skills
2001	First Aid I (St. John's Ambulance Services).
2002-2008	UK and in-house training as per different company roles/requirements for duties.
2010	FICA and FAIS Training
2013-2023	Training on various systems and databases, including: Crystal Reports, AWD, Quintus, Fiscus, Obelix, IMS4, Case Management Systems (e.g. Axxia, OnTime), POPI, FICA, FAIS, Fraud Awareness.

***Other (not complete list due to systems and access lost over time):-
2013-2023***

- MS Office
- Assertiveness skills
- Cultivating Resilience
- FICA and FAIS compliance (yearly)
- Maths (Literacy) - Grade 12.
- Pension Fund Regulations (as and when updated)
- Compliance Training (yearly)
- Employee Wellbeing (yearly)
- Presentation Skills
- Customer Interaction
- Virtual Presentations
- Product Development
- Building Connections
- Giving Effective Feedback
- Customer Interaction Skills
- Introduction to South African Markets Skills
- UK Pension Scheme
- Virtual Presentations
- Virtual Excel
- Technical Marketing
- Managing People
- Retirement Funds
- Introduction to Investment Management
- Compliance Fundamentals
- Compliance (1-5)
- Assertiveness Skills
- Evacuation and Fire Fighting
- Business Writing (1-5)
- Introduction to South African Investment Markets
- Investment Guideline Management

- Active Equity Investment
- Portfolio Specialist – Technical Marketing Compliance
- Pension Scheme – Importance of saving and budget changes
- Introduction to Investment Management
- Cultivating Resilience
- Presentation Skills and Personal Brand
- Supervisory Management training
- Emotional Intelligence
- Customer Interaction Skills
- Fire Marshall

References

To respect Referees' privacy, contact details will gladly be provided at interview stage or upon request.

Final Word/End Note

I sincerely thank you for the time you have taken to review my history and insight into my life (being my career).
With humble appreciation for your consideration, ***Dorathy Catherine Paice***.