

Would you like the opportunity to work within a growing, dynamic, wealth management firm? We are seeking a qualified candidate to join MASECO Private Wealth as a Projects Administrator to support a team consisting of 3. You will report to the COO and the Project Manager.

The ideal candidate would be degree educated or have at least 2 years relevant business experience, with a strong knowledge of Microsoft Excel and previous experience working with an enterprise-level CRM system, ideally Microsoft Dynamics CRM.

The ability to interact with staff (at all levels) in a fast-paced environment, sometimes under pressure while remaining calm and flexible, proactive, resourceful and efficient with a high level of professionalism and confidentiality is crucial to this role. Strong written and verbal communication skills and attention to detail are equally important.

About MASECO Private Wealth

MASECO Private Wealth offers a holistic wealth management approach in developing and implementing tax efficient global wealth and asset management strategies for US persons who are non-domiciled in the UK. With more than a decade of experience in providing cross-border US Wealth Management services, MASECO employs leading global investment strategies and solutions that are both tax efficient and compliant.

Our Values

MASECO Private Wealth was founded in 2008 in the wake of the non-domicile tax rules being introduced in the UK. The Partners had previously developed the US/UK private client desk within a large Private Bank in London. They realised that as a result of these legislative changes, a different approach would be required to service the needs of US citizens living in the UK. The alternative structure needed to remain not only tax-efficient and cost effective for American individuals living in the UK but would also need to be built upon global best practices. Just over 10 years later, MASECO oversees \$2 billion in assets for approximately 750 families.

MASECO is proud to be the UK's first financial services B Corporation member. B Corp is an alternative vision of the role of business in society. It is an assertion that businesses can benefit shareholders whilst also solving social and environmental problems. We want to influence the way investing and charitable giving are viewed in both the financial and wider communities, and to promote the standards of accountability that being a B Corp member represents. www.bcorporation.net

What we do

MASECO develops and implements global, tax-efficient wealth strategies for families, trusts and foundations based in the UK, USA and internationally. Our aim is to deliver expert advice, designed to simplify and tackle the complexities associated with cross-border wealth management. We deliver comprehensive wealth management and investment advice to clients based on trust and open communication. Our mission is to guide families with cross-border economic interests to a meaningful financial future.

Authenticity



Teamwork



Pursuit of Excellence



Empathy



Mastery



Specific duties and responsibilities include:

- Supporting the Project Manager with designing and implementing projects in line with the firm's Project Management Framework by:
 - Helping to establish business requirements
 - Creating project scope documents and goals
 - Project administration, including:
 - Creating project documentation
 - Tracking the progress of projects
 - Providing a variety of management information
 - Quality Assurance
- Performing various data-related activities such as:
 - Restructuring of data
 - Data entry
 - Data enrichment
 - Data cleansing
 - Data reconciliation
- Maintaining and improving the structure of our CRM system (Microsoft Dynamics)
- Ensuring that client records and other information is maintained accurately throughout the firm
- Supporting the business in creating and applying robust processes and procedures
- Reviewing and testing software and other system implementations
- Building and strengthening effective working relationships with colleagues and stakeholders

Skills and specifications for the role:

- Strong numerical and analytical skills with close attention to detail to maintain the highest level of quality and accuracy
- The ability to be assertive when appropriate
- Able to build and maintain good working relationships
- Excellent interpersonal skills; able to listen and converse well on all levels as well as exceptional written and verbal communication skills
- Team player with experience of working in a team environment
- Able to identify issues, use initiative and help others when required
- Efficient time management skills to plan workload and prioritise accordingly
- Tactful, trustworthy, diplomatic and able to maintain confidentiality
- A deep-rooted desire to continue to learn, develop and implement processes and procedures
- Personal development focus, taking responsibility for driving forward personal and professional development in order to maximise effectiveness in this busy and demanding role and to grow within the company
- Hold values that are in line with our own and that will help strengthen our culture

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Education and qualification requirements:

- Essential:
 - Degree educated or at least 2 years relevant experience
 - Strong knowledge of Microsoft Excel
 - Comfortable dealing with complex formulas, queries and connections between multiple Excel documents
- Desirable:
 - Previous experience of working with Microsoft Dynamics CRM
 - Some knowledge of Microsoft Power BI, Power Query

The base compensation is per annum and a discretionary bonus plan and competitive benefits plan is offered.

The closing date for applications is open ended. Please submit your CV with a covering letter to hr@masecopw.com.

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Data Protection Notice

MASECO LLP is dedicated to protecting the confidentiality and privacy of personal data entrusted to us. We comply with all relevant data protection laws, including the EU General Data Protection Regulation (GDPR). Please read the notice below in conjunction with the firm's Data Protection Policy which can be found on our website.

Legitimate Interest

In providing us with your CV you agree that we will use the personal data within that document for the purposes of assessing your suitability as a candidate for the specified role and, accordingly, we have a legitimate interest in such data. The personal data we use includes:

- Your name and personal details (including contact information, such as your primary and other residential address; your email address; your personal mobile telephone number or landline; your unique tax identifier (such as your National Insurance number); your driving licence and/or passport details;
- Your date of birth and/or age;
- Financial details, such as your current salary;
- Education and employment details.

Consent

By providing us with:

- your personal data, you consent to our using that personal data to perform checks with credit reference or fraud prevention agencies which may include obtaining information on you from other sources, such as the electoral roll, court records of debt judgments and bankruptcies and other publicly available sources as well as information obtained through social and other media, such as LinkedIn; and
- any sensitive personal data (such as your racial or ethnic origin or data concerning your physical or mental health or gender orientation), you are agreeing to our processing of that data for the purposes of assessing your suitability as a candidate for the specified role.

Retention

If you are not successful as a candidate for the particular role for which you apply, we will typically retain your personal data and other information you have provided to us or we have obtained about you in the course of the job application process for a period of up to 12 months from the date on which the job vacancy has been filled. If you would prefer that we remove your information from our records prior to this date, please contact us, however, we will continue to hold any information which we are required to retain under applicable laws and regulations. Should we wish to hold information about you, including personal data, for a longer period of time, we will seek your consent.

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