Client Service Associate
Job Specification

Are you an ambitious, passionate, client service professional who understands the importance of giving phenomenal customer service? Would you like the opportunity to work with a growing, dynamic team to deliver the full spectrum of middle to front office support services within a niche wealth management firm? To continue the firms' growth plans we are seeking to hire a Client Service Associate to support our clients and Investment Advisers alike.

You will be responsible for managing client accounts, from onboarding and opening accounts to ongoing maintenance and service, liaising with platform providers and working with our Investment Advisers to provide what we are proud to call a Phenomenal Client Experience™. You will report to the Client Service Manager and will be expected to develop and coordinate the client service offering to ensure we consistently exceed expectations.

The ideal candidate would be degree qualified and will possess a minimum of 18 months' experience in a client service role (middle to front office) within the financial services industry. With a proven ability in delivering a high level of customer service, they will be experienced in handling a wide range of administrative and customer support related tasks and skilled in working independently with little or no supervision. The ability to interact with staff (at all levels) in a fast-paced environment, sometimes under pressure, remaining flexible, proactive, resourceful and efficient with a high level of professionalism and confidentiality is crucial to this role. Expert written and verbal communication skills, strong decision-making ability 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 13 years later, MASECO oversees over

$2.4 billion in assets.

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. MASECO's Wealth Management equation provides a framework for the delivery of a systematic wealth management offering.

Specific duties and responsibilities include

- Dealing with client queries including day to day account administration e.g. processing asset transfer and change of address requests; online access issues or questions;
- Assemble all necessary documentation for Client Meetings, not limited to presentations/meeting materials/review documentation and confidential information;
- Preparing new and maintaining existing client files, including scanning and filing client documents, maintaining these to the company's standards and ensuring they are compliant;
- Data-inputting in the CRM system (in-house training will be given) ensuring information is correct and entered properly;
- Responsible for opening new accounts and ensuring all supporting documentation is compliant;
- Assisting clients with preparation of paperwork; ensuring all required information is sent and returned accurately and in a timely manner;
- Diligently monitor transfers of cash and assets to and from client's accounts;
- Recording all money movements on a daily basis and reporting weekly funds;
- Liaising with platforms and service providers, ensuring that all communications are carried out in a professional and courteous manner;
- Pro-actively service clients on an on-going basis delivering them a PhenomenalClientExperience™ to support the client onboarding process and preserve on-going

client relationships;

- Interacting with platform providers on behalf of the client, not limited to obtaining information in advance of meetings and follow-up for the return of documentation;
- Build and maintain effective working relationships with clients and colleagues.

Skills and specifications for the role:

- Can clearly understand and demonstrate giving outstanding customer service;
- Effective presentation skills and the ability to research and package information for the team and clients;
- Deploy assertiveness skills and use initiative when appropriate;
- 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 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.

Education and qualification requirements:

- Possess a minimum of 18 month's experience in middle to front office customer services within financial services;
- Strong knowledge of MS Office Suite;
- CRM experience is advantageous however training will be provided

The Benefits

- A competitive salary commensurate with your experience and qualifications
- Discretionary annual bonus
- 25 days' holiday per annum, increasing with years' service
- Life Assurance scheme (4 times salary)
- Pension Matching Scheme
- Income Protection Scheme
- Private Medical Insurance for employees, with option to add spouses/partners and dependents
- Financial support with training for professional development (if appropriate to the job function)
- Central London office

Application Process

There is no closing date for applications. Please submit your CV with a covering letter to: HR@masecopw.com.

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.