

Senior Client Service Executive Job Specification



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 Senior Client Service Executive to support a team consisting of 8 team members. You will report to the Client Service Manager.

The ideal candidate would be degree educated and have a minimum of 5 years' experience working in a busy team environment within Wealth Management.

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 13 years later, MASECO oversees just under \$3 billion in assets for over 800 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. MASECO's Wealth Management equation provides a framework for the delivery of a systematic wealth management offering:

Authenticity



Teamwork



Pursuit of Excellence



Empathy



Mastery



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Specific duties and responsibilities include:

- Perform MASECO client onboarding and AML checks for new clients and open client accounts with Platform Service Provider
- Pre-fill client account opening and funding documentation for Platform Service Provider
- Update and maintain client records on CRM system and Platform Service Provider
- Process client transfer and payment requests at Platform Service Provider
- Provide administrative support to clients, advisors and liaise with external Platform Service Provider
- Share management of internal and external Client Service team mailboxes
- Maintain, assign and monitor departmental tasks via the Client Service Team Tracker to ensure they meet SLA requirements
- Approve Platform Service Provider requests i.e., Payment requests, new account opening and amendments
- Provide guidance and training for junior team members
- Participate in ad-hoc team projects and relevant working groups
- Assist in the creation, documentation and update of the departmental procedures
- Facilitate all client subscriptions into the Alternative Credit Fund with the third-party fund administrators

Skills and specifications for the role:

- Strong numerical and analytical skills with close attention to detail to maintain the highest level of quality
- Deploy assertiveness skills and use initiative when appropriate to build and maintain good relationships across the company
- 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
- 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

Education and qualification requirements:

- Degree educated
- Strong knowledge of MS Office Suite; Excel, Word and PowerPoint

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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