

Microsoft Dynamics CRM Administrator Job Specification



Would you like the opportunity to work within a growing, dynamic, wealth management firm? We are seeking a qualified candidate to join our IT team as a CRM Administrator.

The ideal candidate will 2+ years experience customising Microsoft Dynamics CRM and working with workflows, business rules and business process flows to deliver automation.

Reporting to the IT Manager, you will be the point person for CRM at MASECO, working with stakeholders across the business to understand their needs and designing solutions in Dynamics CRM to streamline business processes. You will be managing change requests from the business and delivering them in regular releases as well as working on longer term automation projects and managing integrations between Dynamics CRM and other 3rd party systems.

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 \$2.6 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

Authenticity



Teamwork



Pursuit of Excellence



Empathy



Mastery



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:

- Day to day administration and customisation of Microsoft Dynamics CRM 365 on premise (v8.2)
- Managing CRM change requests from across the business, releasing monthly feature updates and managing delivery of these updates into the business
- Managing integrations between CRM and other 3rd party systems
- Automating business processes using business rules, workflows, business process flows, cases and queues
- Creating and managing dashboards across the business
- Ensuring appropriate documentation is maintained for all automation
- Managing CRM security roles
- Managing future version upgrades

Skills and specifications for the role:

- 2+ years experience customising Microsoft Dynamics CRM (any version)
- Experience working with business rules, workflows and business process flows

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 recruitment@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:

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- 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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