

## Senior Wealth Associate 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 niche wealth management firm as a Senior Wealth Associate, responsible for supporting a Senior Wealth Manager and Managing Partner in the administrative management of client portfolios and helping to build their business.

The ideal candidate would be degree qualified and will possess a minimum of 2 years' experience in a Wealth Management support role within the financial services industry. With a proven ability of delivering a high level of client service, they will be experienced in handling a wide range of administrative and client 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 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, decision-making abilities and attention to detail are equally important. You will report to the Senior Wealth Manager within your team on a day-to-day basis.

### 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 15 years later, MASECO oversees under \$3 billion in assets.

### 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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Wealth Management = Investment Management + Wealth Planning + Relationship Management

## Specific duties and responsibilities include:

- Liaising with clients on behalf of the Wealth Manager, ensuring that all communications are carried out in a professional and courteous manner;
- 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 for the Wealth Manager, including scanning and filing client documents, maintaining these to the company's standards and ensuring they are compliant;
- Data-inputting in the CRM system for the Wealth Manager (in-house training required);
- Liaising with platforms and service providers, on direct instruction of the Wealth Manager;
- Diary management for the Wealth Manager; liaising with the clients to arrange/confirm meetings and managing the Wealth Manager's time efficiently;
- Managing the Wealth Manager's expense claims; collating and processing;
- On occasion: coordinating travel for the Wealth Manager, conducting research, obtaining visas and currency when appropriate;
- Surprise and Delight – sourcing gifts for the Wealth Manager's clients and intermediaries, ensuring purchase records are always up to date and accurate for compliance purposes;
- Delivering a comprehensive financial planning administration service to support the Wealth Manager throughout the client onboarding process and maintaining on-going client relationships;
- Preparing recommendation letters based on information provided by the Wealth Manager;
- Preparing rebalance sheets for client portfolios and placing trades for the Wealth Manager;
- Interacting with clients on behalf of the Wealth Manager, not limited to obtain information to create cashflow plans in advance of meetings and follow-up for the return of documentation;
- Creating and implementing recommendations within the scope of the role;
- Assemble review documentation and review reports required for client meetings;
- Accompany the Wealth Manager to meetings and take notes as required;
- Produce high-quality and professional client-friendly report.

## Skills and specifications for the role:

- Strong 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;
- Hold values that are in line with our own and that will help strengthen our culture.

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### Education and qualification requirements:

- Possess a minimum of 2 years' experience in Wealth Management;
- Part Investment Advice Diploma qualified;
- Strong knowledge of MS Office Suite;
- CRM experience is advantageous but training will be provided.

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](mailto: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:

- 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

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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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