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 MASECO Private Wealth as a Wealth Associate, responsible for supporting Wealth Executives and Wealth Managers across the firm.

The is an exciting opportunity for a graduate who is looking to pursue a career in Wealth Management. We are looking for someone who is committed to adding value by delivering results in an administrative capacity and by preparing client-ready documents. The role has potential to develop into having some exposure to clients and training and support will be provided with study for the financial planning qualifications required to become a fully qualified Wealth Planner at MASECO.

About MASECO Private Wealth

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:
Wealth Management = Investment Management + Wealth Planning + Relationship Management

Our Values

MASECO has a core set of values that form the foundation of everything we do. This translates into behaviour that is consistently applied and communicated both internally among our employees and externally among our clients. We strive to provide a Phenomenal Client Experience and seek to work with individuals and intermediaries who understand and appreciate our DNA. We believe that as an organisation we have multiple responsibilities – to our clients, our employees, our suppliers and to the world around us. MASECO strives to ensure that decisions are made with these responsibilities in mind.

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

Specific duties and responsibilities include:

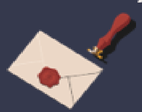
- Delivering a comprehensive wealth management administration service to support Wealth Executives (WEs) and Wealth Managers (WMs) in their daily roles
- Providing technical and administrative support to the WEs & WMs
- Generating key client documents based on information provided by WEs & WMs and using our internal record keeping system
- Liaising with our Client Services team to ensure smooth client onboarding and maintenance
- Preparing rebalance sheets for client portfolios ahead of review meetings and as a result of other ad-hoc requests
- Assisting with meeting preparation at the request of the WEs & WMs
- Preparing client meeting summary documents based on notes taken by the WEs & WMs and ensure any follow-up action items are assigned to the relevant parties and actioned in a timely fashion
- Running performance reports at the request of WEs & WMs
- Other ad-hoc reporting for clients, including capital gains taxation calculations
- Creating new client files/maintain existing client files, ensuring they are compliant
- Developing an understanding of the firm's client relationships and key contacts
- Liaising with platforms and service providers as required
- Creating and maintaining effective working relationships with clients and colleagues

Skills and specifications for the role:

- Strong numerical and analytical skills with close attention to detail to maintain the highest level of service;
- Strong presentation skills and the ability to research and package information clearly and concisely for the team, wealth managers and clients;
- Deploy assertiveness skills and use initiative when appropriate to build and maintain good relationships with clients, wealth managers and colleagues 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 – minimum 2:1, ideally in a subject requiring mathematics or financial knowledge

Authenticity

Teamwork

Pursuit of Excellence

Empathy

Mastery


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

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.