Wealth Planner
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 Wealth Planner, responsible for supporting a Managing Partner and his team, in the administrative management of client portfolios and helping to build their business.

The ideal candidate would be degree qualified, will possess a minimum of three years' experience in a Wealth Management support role within the financial services industry, and may be studying towards the Diploma in Financial Planning. 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 Managing Partner within your team on a day-to-day basis.

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 financial planning administration service to support the Pod while maintaining Pod client relationships
- Preparing and implementing recommendations and provide general administrative support within the scope of the role
- Preparing rebalance sheets for client portfolios
- Prepare client meeting plan summary plan documents and recommendations
- Obtain information to create cash flow plans in advance of meetings and follow-up for the return of documentation
- Assemble review documentation and review reports required for client meetings
- Run daily/weekly/monthly performance reports on IMS (Investment Management System) and ensure any anomalies are investigated and resolved
- Ad hoc reporting for clients, including CGT calculations
- Creating new client files/maintain existing client files, ensuring they are compliant
- Monitor client accounts for any investment guidelines violations, updates and changes
- Maintenance of CRM for Pod clients
- Liaising with platforms and service providers as needed
- Create and maintain effective working relationships with clients and colleagues

Skills and specifications for the role:

- The requisite knowledge for the role being undertaken
- Strong numeracy skills, attention to detail and experience of dealing with multiple currencies
- Solid analytical and research skills and able to communicate technical knowledge clearly
- Proficiency with MS Office Suite and CRM systems
- Deploy assertiveness and use initiative
- Excellent interpersonal skills; able to 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
- Well organised
- Efficient time management skills to plan workload and prioritise accordingly

Authenticity

Teamwork

Pursuit of Excellence

Empathy

Mastery

- 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

Education and qualification requirements:

- Minimum of 3 years' experience in similar role within financial services
- Strong knowledge of MS Office Suite;
- CRM experience is advantageous but training will be provided.

Application Process

There is no closing date for applications. 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.