MASECO
PRIVATE WEALTH

Client Service Executive
Job Specification

Are you an ambitious, passionate, client service professional who understands the importance of giving phenomenal customer service? Would you like the opportunity to work with a growing, dynamic team to deliver the full spectrum of middle to front office support services within a niche wealth management firm? To continue the firms' growth plans we are seeking to hire a Client Service Executive to support our clients and Investment Advisers alike.

You will be responsible for managing client accounts, from onboarding and opening accounts to ongoing maintenance and service, liaising with platform providers and working with our Investment Advisers to provide what we are proud to call a PhenomenalClientExperience™

The ideal candidate would be degree qualified and will possess a minimum of 18 months' experience in a client service role (middle to front office) within the financial services industry. With a proven ability in delivering a high level of customer service, they will be experienced in handling a wide range of administrative and customer 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, remaining flexible, proactive, resourceful and efficient with a high level of professionalism and confidentiality is crucial to this role. Expert written and verbal communication skills, strong decision making ability and attention to detail are equally important.

You will report to the Client Service Manager and will be expected to develop and coordinate the client service offering to ensure we consistently exceed expectations.

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 focus is primarily on Investment Consulting & minimisation of Income and Capital Gains taxes on investments with some emphasis on Wealth Transfer Planning, Wealth Protection and Charitable Gifting.

Specific duties and responsibilities include:

- Dealing with client queries including day to day account administration e.g. processing asset transfer and change of address requests; online access issues or questions;
- 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, including scanning and filing client documents, maintaining these to the company's standards and ensuring they are compliant;
- Data-inputting in the CRM system (in-house training will be given) ensuring information is correct and entered properly;
- Responsible for opening new accounts and ensuring all supporting documentation is compliant;
- Assisting clients with preparation of paperwork; ensuring all required information is sent and returned accurately and in a timely manner;
- Diligently monitor transfers of cash and assets to and from client's accounts;
- Recording all money movements on a daily basis and reporting weekly funds;
- Liaising with platforms and service providers, ensuring that all communications are carried out in a professional and courteous manner;
- Pro-actively service clients on an on-going basis delivering them a PhenomenalClientExperience™ to support the client onboarding process and preserve on-going client relationships;
- Interacting with platform providers on behalf of the client, not limited to obtaining information in advance of meetings and follow-up for the return of documentation;
- Build and maintain effective working relationships with clients and colleagues.

Skills and specifications for the role:

- Can clearly understand and demonstrate giving outstanding customer service;
- Effective 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.

Education and qualification requirements:

- Possess a minimum of 18 month's experience in middle to front office customer services within financial services;
- Strong knowledge of MS Office Suite;
- CRM experience is advantageous however training will be provided.

The base compensation per annum is contingent upon proven experience, in addition a discretionary bonus plan and competitive benefits plan is offered.

The closing date for applications is open ended.