MASECO
PRIVATE WEALTH

Operations Manager
Job Specification

Are you an ambitious, passionate, professional? Would you like the opportunity to work with a growing, dynamic team within a niche wealth management firm? To continue the firms' growth plans we are seeking to hire an Operations Manager.

Reporting to the Chief Operating Officer, the ideal candidate would be degree educated and will possess a minimum of 5 years' experience in a similar role within the financial services industry. Wealth Management experience is preferred although not essential.

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 analytical and numeracy abilities with attention to detail and strong decision making skills are equally important.

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 under 10 years later, MASECO oversees over $1.5 billion in assets for approximately 550 families.

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. As such we attained B Corporation status and were one of the first wealth management firms in the UK to achieve this certification. The certification confirms and emphasises our commitment to look beyond the traditional model of capitalism when making decisions that affect others.

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.

Specific duties and responsibilities include:

- Oversight and management of the Operations Team comprising of 3 individuals
- The Operations team has responsibility for the following:
    - Data Entry and maintenance of the firm's investment management system (Third Financial – Tercero and CRM), including but not limited to the following data – custodian data, client data, securities data, transactions, pricing feeds, currency data, benchmark data, static data.
    - Reconciliation between company records and it's various Platform Service Providers (Custodians)
    - Managing relationships with Platform Service Providers (Custodians) – including on-boarding new providers
    - Managing relationships with the operations systems/applications providers (Third Financial)
    - Working on the continued improvement and efficiencies of company processes and the functionality of the investment management system and client relationship management system
    - Oversight of trade reconciliation
    - Responsibility for the production of client reporting
    - Implementation of companywide projects that include operations
    - Production of management information.

Skills and specifications for the role:

- Proven people-management skills
- Excellent process and planning experience.
- Excellent numerical and analytical skills with close attention to detail.
- Proven ability to implement efficient systems and processes.
- Goal orientated – task driven with a proven ability to work autonomously.
- Effective time management skills to plan workload and prioritise accordingly often under tight deadlines.
- Reliability - able to follow through on commitments.
- Excellent interpersonal skills; able to listen and converse well on all levels as well as exceptional written and verbal communication skills.
- Excellent team player, able to identify and help others when required.
- Tactful, trustworthy, diplomatic and able to maintain confidentiality at all times.

Education and qualification requirements:

- Degree educated minimum 2:1
- Minimum of 5 years proven operations experience within the financial services industry
- Excellent project management skills
- General IT infrastructure knowledge.

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 **Friday 23 March 2018.** Please submit your CV with a covering letter to Denise.Smith@masecopw.com