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 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.

Authenticity

Teamwork

Pursuit of Excellence

Empathy

Mastery

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MASECO™
PRIVATE WEALTH

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:

- 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.

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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. Please submit your CV with a covering letter to Denise.Smith@ masecopw.com.