

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 Senior Wealth Manager and their Pod in the administrative management of client portfolios and helping to build their business.

The ideal candidate would be degree qualified and will possess a minimum of two years' experience in a Wealth Management support role within the financial services industry. 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 Senior Wealth Manager within your team on a day-to-day basis.

## 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 Values

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 over 10 years later, MASECO oversees over \$1.75 billion in assets for approximately 600 families.

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](http://www.bcorporation.net)

## 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

Authenticity



Teamwork



Pursuit of Excellence



Empathy



Mastery



## 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
- 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.

The base compensation is contingent upon proven experience and 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 [Alexandra.McWalter@masecopw.com](mailto:Alexandra.McWalter@masecopw.com) .

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