

CLIENT SERVICE MANAGER - JOHANNESBURG

Maitland is a global advisory and administration firm providing seamless multi-jurisdictional legal, tax, fiduciary, investment and fund administration services to private, corporate and institutional clients.

Founded in Luxembourg in 1976, we specialise in complex, cross-border solutions, with 1,300 employees operating from 16 offices across 12 countries.

We leverage our strong values and collaborative culture to develop and maintain trusted relationships with our clients. By combining our talent and one-firm approach, built on our best-of-breed multi-jurisdictional platforms, we provide tailored end-to-end solutions that embrace complexity and deliver simplicity.

Summary of the position

To provide professional, consistent, end-to-end fiduciary, estate and planning advice, trustee and administrative services, to an allocated portfolio of fiduciary clients, in a multi-skilled specialist and administrative team – building strong client and service relationships to enhance, retain and grow our business.

The Client Relationship Manager (CRM) will perform various specialist, administrative, servicing, co-ordinating, support and relationship management activities to assist with the planning, take-on, administration and on-going servicing of a high net worth client base, working closely with and supporting other teams within Maitland.

Outline of main duties and responsibilities

The Client Relationship Manager (CRM) forms an integral part of Maitland's Fiduciary Services, bringing together the skills, systems, processes and procedures relating to Family Office Client Management services.

The CRM will be expected to manage a variety of tasks and enquiries. The role is to ensure that all interaction with the client is handled in a timely, professional manner with the client should be seen as an opportunity to meet our business Goal of acquiring new and retaining existing relationships.

The Client Relationship Manager will be expected to

- Meet with prospective, new and existing clients to understand their financial scenario, the wealth and generation and preservation plans and to determine their objectives – provide succession planning, asset protection and structure and implement a planning service to our clients.;
- Oversee client portfolio's interactions, transactions and enquiries, which will include but not be limited to new business take-on, financial transacting, general changes or requests, as well as dealing with intermediaries on the client's behalf;
- Ensure that all interaction with the client is handled in a timely, professional manner, with comprehensive, technically sound and quality responses;
- Act as Maitland representative Trustee or Director on client entities or Maitland entities, as required;
- Attend or chair client meetings;
- Fulfill and comply with Fiduciary duty including tax and accounting compliance functions;
- Ensure that the Trust functions properly and that the provisions of the Trust deed are accurately observed and adhered to;
- Ensure that all obligations in terms of client mandates and expectations are met;
- Take control and manage complex situations, i.e. between Trustees, Beneficiaries, etc.;
- Negotiate fees and annual increases (where applicable) within set guidelines and take responsibility for effective debtor management and fee collections through efficient internal collaboration;
- Introduce our clients to the services offered by Tax and Accounting, Legal, Investment and Corporate Services and collaborate with the take-up of more Maitland services (one-firm approach);
- Network; build relationships, opening new doors to grow our business and market share;
- Promote Maitland, our services and image, i.e. writing business articles to be published, etc.;
- Develop and maintain sound relationships with co-advisors, be it internal or external;

- Act as a "designated officer" and signatory in the South African Fiduciary office on behalf of Maitland, as required;
- Liaise and communicate effectively and professionally on all client and operations issues, both internally and externally;
- Follow processes and procedures, working according to set quality standards and keeping to agreed turnaround times;
- Provide quality input on opportunities and potential threats/risks to the business unit;
- Meet personal and team key performance targets;
- Assist with or take responsibility for internal projects within Maitland Family Office as they arise; and
- Provide team support to all areas within the greater Private Client teams and the wider Maitland business.

Skills and experience required

The successful candidate will meet the following requirements:

- 5 to 10 years' current and relevant experience, ideally within the trust or fiduciary services sector, with excellent relationship management, administrative, servicing, coordinating and support skills;
- Suitable professional qualifications relevant to the duties and responsibilities listed above;
- An in-depth knowledge and understanding of the South African Legislation, trust governance and trust administration;
- Knowledge of the South African tax legislation;
- Passionate about service and service excellence;
- Honesty and integrity of the highest order and respect for the confidentiality of our clients' and Maitland affairs;
- Confident in leading face-to-face client meetings, as required;
- Creative and shows innovation;
- Flexible and dynamic with an enthusiastic approach and positive attitude;
- Highly organised, efficient and professional with a sense of urgency and good time management.
- Resilient – overcoming obstacles and delivering results by showing tenacity;
- Confidently takes initiative, is pro-active and has solid problem resolution skills and sound judgment;
- The ability to prioritise and plan a challenging workload, and to work in a pressurized and demanding environment;
- An excellent eye for detail;
- The capacity to work well both under supervision as a member of a team and independently when required to do so;
- Demonstrate a high degree of diplomacy and tolerance;
- Excellent computer skills with the ability to learn and understand new systems.

Reporting structure

The Client Relationship Manager (CRM) will report to the Head of Fiduciary Services South Africa.

Remuneration level

Remuneration will be market related and commensurate with experience and seniority. In addition, the successful candidate will receive a competitive benefits package.

