

## Client Service Manager (CSM), Private Clients - Cape Town

Maitland is a global advisory and administration firm providing a consolidated 'one-firm' approach to fund, family office and corporate services. We specialise in complex, cross-border solutions, operating from 16 offices across 12 countries.

Founded in Luxembourg in 1976, the firm is privately owned and fully independent, with 1 300 employees and over \$280 billion in assets under administration.

This position will be based in the Cape Town office of Maitland, located in Mowbray.

### Summary of the position

To provide a professional, consistent, one-stop, end-to-end fiduciary advisory and administrative services to selected client-book in a multi-skilled advisory and administrative team – building strong service relationships to enhance, retain and grow business.

The Client Service Manager (CSM) will perform various advisory, administrative, servicing, coordinating, support and relationship management activities to assist with the take-on and administration of trusts, wills, estates, curatorships and private client affairs, working closely with and supporting other teams in Maitland.

### Outline of main duties and responsibilities

The CSM will be expected to:

- ! Taking full personal ownership, responsibility and accountability of all transactions, interaction and enquiries for allocated Private Clients (including but not limited to new business or take-on, financial transacting, general changes or requests, compliance monitoring, invoicing and fee payment monitoring, file administration and annual file reviews, dealing with intermediaries, investment companies, banks etc on the client's behalf, etc.);
- ! Follow processes and procedures, working according to set quality standards and keeping to agreed turn-around times, on a daily basis;
- ! Develop and maintain sound relationships with co-advisors;
- ! Identify and report on suggested possible process and/or system changes/enhancements to ensure congruent service delivery going forward;
- ! Provide quality input on opportunities and potential threats/risk to the Private Client business unit;
- ! Meeting of personal and team targets;
- ! Assist with projects in Private Clients as they arise;
- ! Provide team support to all areas within the greater Private Clients team.
- ! Drive and contribute to a culture of quality/excellence, through risk awareness and adherence to compliance standards and operational controls

### Skills and experience required

The successful candidate:

- ! Shall have at least five years current and relevant experience, ideally within the trust or fiduciary services sector, with excellent administrative, servicing, coordinating, support and relationship management skills;
- ! Shall have suitable professional qualifications relevant to the duties and responsibilities listed above;
- ! Is passionate about service and service excellence, with a 'will do, can do' attitude – demonstrating a determination and encourage others to achieve excellence in every task, action and or interaction;
- ! Is flexible, dynamic with an enthusiastic approach – with a positive and upbeat attitude;
- ! Is highly organised, efficient and professional with a sense of urgency and good time management;
- ! Takes initiative, is pro-active and flexible with great problem resolution skills – sound decision making and judgement;
- ! Has the ability to work confidently, proactively, use initiative, be decisive and be able to consistently perform well when under pressure;

- ! Is detail and quality conscious – accountable, responsible and adaptable;
- ! Has honesty and integrity of the highest order and respect for the confidentiality of our clients' and Maitland's affairs;
- ! Has the capacity to work well both under supervision as a member of a team, and independently when required to do so;
- ! as excellent skills to communicate confidently, professionally and effectively with clients, staff and management (verbal and or written);
- ! Is knowledge and information seeking – understanding the importance of knowledge and skills and actively manage own development path and plan;
- ! Has excellent computer and typing skills, with the ability to learn and understand new systems with confidence, and have a good knowledge and experience of working on and understanding the Microsoft Office suite (including Excel, Word and Outlook).

### **Reporting structure**

The Client Service Manager (CSM) will report to the Senior Manager, Private Clients, Africa or a team leader within the client engagement reporting structure.

### **Remuneration level**

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