Team Support, Client Operations Job Description

Team:	Client Operations
Reporting to:	Assistant Manager / Manager

About Us

We are an independent and privately owned Family Office Services provider, based in Jersey and supporting clients all over the world. Since opening our doors in 2013 we've brought a fresh approach to our market, through our progressive, flexible, and service-focused offer. After a decade of growth, building a strong team, and earning a number of industry awards, we're now adding to our team, and are looking for people who would thrive in an environment where their voice, and their contribution will be invited, heard, and appreciated.

The Role

Our Client Operations team plays a crucial role to the running of the business, taking responsibility for the first-class service delivery in onboarding, data management, regulatory reporting, screening, periodic reviews and risk management to our clients and our administration teams and in doing so, ensuring our client facing administration teams can deliver a premium service to our clients.

We are expanding the team and in this new role you will provide administrative support to the client operations team, with a focus on supporting the payments process, and gaining exposure to a range of operational areas, giving you a great base on which to grow a career in the industry. You will be given training and guidance to help you ensure that all tasks are carried out efficiently and effectively, in accordance with Crestbridge Family Office Services procedures at all times.

Key Result Areas

- Inputting of all payments efficiently, accurately and on time.
- Excellent levels of service to internal and external clients, in line with Crestbridge standards, procedures and guidelines.
- Take responsibility for own personal development, in line with agreed performance objectives and development plans.
- Be a role model and ambassador for Crestbridge Family Office Services.

Key Responsibilities

The list below details the tasks that your role is likely to include. It is not exhaustive and may be amended from time to time:

Banking and Data

- Inputting of payments for the client facing teams.
- Complete account opening forms for new bank accounts.
- Provide support to the client teams with any other payment related administration.
- Assist in relation to updates to the list of authorised signatories and communicating changes to the relevant banks.
- Assist with updates and input of information into the client database including updates to client information, banking information, statutory registers etc.

Administration

- Daily input of time on timesheet.
- Prioritising and organising day to day workloads.

- Dealing with day-to-day queries in a timely manner.
- Assist in meeting team objectives and meet agreed service levels.
- Update of team schedules/reports.
- Update any team specific spreadsheets/information.

General

- Attend and constructively contribute to team meetings.
- Supporting the team with general administration such as scanning, photocopying, post and filing,
- Arrange incoming and outgoing couriers and all financial administration in relation to this.
- Participate in projects and initiatives when required.

Requirements

Qualifications

- A good academic background to include GCSEs or equivalent in English Language and Mathematics – Grade C (Level 4) minimum.

Knowledge and Experience

- Working knowledge of Microsoft Office with strong Excel skills.
- Some office experience would be an advantage.

Skills and Qualities

- Good communication skills with excellent written and verbal English.
- Drive and a desire to learn and develop.
- Highly accurate with good attention to detail.
- Good organisation skills with and the ability to prioritise workloads.
- A proactive and flexible, team player.

Additional Information

We offer all our permanent team members a great benefits package that includes*:

- Competitive salary with transparent salary bandings.
- Private healthcare (with no exclusions for pre-existing conditions.)
- Life insurance.
- Critical illness cover.
- Annual leave entitlement of 25 days, with the option to buy or sell up to 5 extra days.
- 3 additional wellbeing days a year.
- Discretionary annual bonus.
- Support for professional qualifications and ongoing development.

**Eligibility for certain benefits will commence after completion of probation. Crestbridge reserves the right to vary or withdraw benefits at any time.*