

Client Director Job Description

Team: Client Handling
Reporting to: Managing Director

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.

Our firm's culture is shaped by our three central values. The **integrity** consistently to do what is right, maintaining and enhancing our clients' trust. The **professionalism** confidently to deliver expert guidance, rooted in a truly independent approach. And the **agility** to think and act at a pace that mirrors events in an increasingly complex and dynamic world.

Following strong and sustained growth, and receipt of an array of industry accolades, we're now adding to our team. We are looking for talented and dedicated colleagues who will thrive in an environment where their voice, and their contribution will be invited, heard, and appreciated.

The Role

To work with your fellow Directors to drive service delivery and team performance of the client handling teams, whilst working with the broader Crestbridge senior leadership team to drive the vision, mission and values of the business. To demonstrate accountability to the Board and relevant stakeholders and apply skill and care in exercising your duties.

To act as a role-model leader, maximising the contribution of your business unit to the business, both through your own efforts and by leading, supporting and developing your team and other colleagues.

Key Result Areas

- Inspire confidence in new and existing clients by working with clients' key decision makers and influencers to proactively build strong, effective and lasting relationships.
- Share responsibility for the operational and financial performance of your business unit as part of the Client Service Director team.
- Develop and uphold a positive, strong, commercial and compliant culture within your business unit and the business as a whole.
- Contribute to the overall strategy, structure and prosperity of your business unit.
- Share responsibility for colleague resourcing, retention and development in your business unit.
- Act as an authority on technical client specific matters.
- Take responsibility for your personal development, in line with agreed performance objectives and development plans.
- Be a role model and ambassador for Crestbridge Family Office Services, always acting in accordance with our core values.
- Provide excellent levels of service in line with Crestbridge Family Office Services standards, procedures and guidelines.

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:

Client Service Excellence

- Develop a deep understanding of existing clients and demonstrate ways to add value and build client loyalty as well as profitable and successful client relationships.
- Actively manage client retention and growth, measuring and maintaining client satisfaction.
- Proactively develop and lead client strategy always maintaining and improving strong client satisfaction and profitability.
- Share client needs and feedback across the client handling teams to help strengthen relationships and further build on the service provided.
- Lead and manage the client handling teams to ensure that they are also fostering strong, proactive client relationships and high levels of service.

Technical Expertise

- Lead on a portfolio of high risk and complex client entities to ensure that they act according to their guiding principles and within corporate and regulatory constraints and good practice.
- Demonstrate and be recognised for technical excellence in your specialist area and expertise in other relevant business and operational areas of Crestbridge.
- Consult appropriate colleagues when undertaking work outside own area of expertise to ensure compliance and minimise risk.
- Demonstrate sound judgment and professional scepticism when accepting instructions from new and existing clients, particularly when dealing with risk issues.
- Provide independent technical and strategic guidance in the capacity of director of client entities, at all times upholding the highest level of corporate governance and being prepared to challenge where appropriate.
- Maintain a knowledge of the external business environment and relevant industry specific trends in order to provide sound and practical advice to clients.
- Demonstrate knowledge of corporate governance requirements, internal compliance, anti-money laundering and other relevant policies and procedures.
- Take a project management approach to the administration of client structures, through the strong management of intermediaries and advisors and the proactive handling of client expectations.
- Share and communicate technical knowledge to colleagues.
- Ensure that all CPD requirements are met year on year for both you and all members of your team, and that training and development is relevant.

Leadership and Management

- Accountable for the actions of and leadership of your teams, leading and providing support to managers in their day-to-day management of their people.
- Develop commitment from your team and other colleagues through recognising good performance, providing timely and constructive feedback and through leading by example.
- Identify talent and develop high-potential people within the immediate team.
- Build commitment through fair, consistent and persuasive behaviour, championing ideas and setting realistic and challenging objectives through appraisal and other performance measurement initiatives.
- Communicate clearly and effectively, using authority and influence appropriately, and demonstrating the ability to lead and direct the efforts of others to achieve results.
- Encourage teambuilding and value people, their ideas and opinions. Be approachable for all types of advice and proactive in sharing knowledge.

- Provide on the job coaching to more junior colleagues with a particular emphasis on client matters, board and trustee decision making and fiduciary matters.
- Work collaboratively as part of the client director and leadership teams to support, cascade and embed Board decisions, behaving with the utmost integrity and professionalism at all times.
- Demonstrate the ability to focus on the commercial needs of the business while acting responsibly and fairly towards employees, clients and intermediaries.

Business Growth

- Define client needs by listening actively to their requirements and providing solutions.
- Add value to the client relationship by anticipating needs beyond the existing relationship.
- Continually strive to create and build a strong market profile and promote the Group's services by attending networking events, speaking at seminars and conferences, writing articles and participating in other business development initiatives where appropriate.
- Maintain relationships with clients and intermediaries even when turning down work or clients choose to deal with competitors.

Operations

- Daily input of time on timesheet, ensuring that all time is recorded, and financial results are monitored and continually compared with targets.
- Responsible for participating in appropriate projects and initiatives.
- Attend, constructively contribute and chair internal committees/meetings as required from time to time and ensuring the timely and accurate reporting of key information where relevant.
- Prepare and submit budgets and monitor business unit performance against budgets and wider competitors.
- Maintains a sound working knowledge of the use and impact of information technology and systems that are relevant to the business of the Crestbridge Group and to its clients.
- Demonstrates commerciality and business acumen in relation to financial management, providing realistic and considered fee quotes and invoices for client work in a timely manner.
- To work with the leadership team to introduce operational change and efficiency initiatives both within your own business unit.
- To develop cost efficiencies through the introduction of new procedures, systems, working practices, improved financial management and other initiatives.
- To drive forward change within your business unit which can be directly linked to the increased profitability of the business.

Requirements

Qualifications

- Recognised Professional Qualification – e.g. Accountancy, Chartered Secretary, STEP, Banking, Securities or other relevant Table 4 qualification.

Knowledge and Experience

- 10 years' relevant finance industry experience.
- Minimum of 8 years working at senior level within an offshore financial services organisation.
- Experience holding directorships.
- Deep and demonstrable knowledge private client administration and relationship management.
- Comprehensive and detailed understanding of trust and company law and current industry legislation, regulation and working practices.
- Comprehensive understanding of company financial management with the ability to understand and comment on complex financial information.
- Understanding of the requirements under Company Law affecting your appointment.
- A detailed understanding of corporate governance, compliance and risk management.
- Experience of managing and leading people, driving high performance.

Skills and Qualities

- Strong communication and presentation skills.
- A decision maker who gives the highest commitment to service excellence and corporate governance standards and can prioritise and deal with conflicting and demanding deadlines.
- Ability to scrutinise and understand complex documentation.
- Persuading and influencing skills with the ability to challenge the status quo, question, and probe.
- Ability to inspire, motivate and develop others whilst managing underperformance quickly and fairly.
- Ability to develop policy, procedures and processes.
- Integrity, tact, and diplomacy.
- Strong degree of business acumen.
- Open, approachable, and accessible to the team.
- Ability to develop relationships and inspire client and colleague confidence.
- Degree of personal authority which commands respect.
- Emotional resilience and results driven with a proactive and disciplined approach to work.

Additional Information

Our Core Values

Our team share and demonstrate the following behaviours which align to our values:

Integrity – kind, trustworthy and compassionate, working collaboratively and respectfully with colleagues, clients and other stakeholders.

Professionalism - reliable and accurate, working consistently to deliver solutions efficiently, effectively and with a level of technical expertise appropriate to your experience.

Agility - flexible and commercial, happy to adapt to changing demands and offer support wherever required to meet the needs of the business.

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

- Competitive salary
- Non-contributory pension scheme
- Private healthcare (with no exclusions for pre-existing conditions)
- Life insurance
- Critical illness cover
- Option to buy or sell up to 5 extra days of annual leave
- 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.*