

Client Director Job Description

Team: Crestbridge Fiduciary, Wyoming
Reporting to: Managing Director, Crestbridge Wyoming

The Crestbridge difference

Crestbridge Fiduciary is a privately-owned and independent fiduciary services provider.

Our specialist team work alongside HNWI and UHNWI individuals and families, providing a comprehensive and sophisticated global platform for protecting and structuring wealth. We offer a truly multi-jurisdictional service accommodating even the most complex cross-border structures, supported from our offices in Jersey and Wyoming.

Driven by an uncompromising focus on service quality, and holding ourselves to the highest standards of transparency and personal integrity, we cultivate relationships that endure across generations. We are committed to ensuring our clients enjoy the clarity and peace of mind to pursue life's passions.

Life at Crestbridge Fiduciary

Our shared company values are integrity, professionalism and agility. These are principles we strive to uphold not only in our dealings with clients, but in how we support one another.

We are committed to offering clear and engaging career paths, and an environment in which all colleagues feel empowered. Where possible, you will be afforded as much responsibility as you are comfortable with accepting, along with ample opportunity to realise your full potential through diverse and challenging work.

Alongside continuous training and development, invaluable mentorship and guidance are provided by our globally experienced executive team.

Along with a lively social calendar of events and activities, we strive to engage fully with, and contribute to, the communities in which we live and work.

The Role

Working closely with our Managing Director, this new role will be responsible for delivering first class service to the clients of Crestbridge Wyoming. This will include managing the transition of incoming CBF clients from our former joint venture, as well as overseeing the ongoing administration and leading the alignment of client files inherited as part of the recent acquisition of Wyoming Trust Company with established practices and standards.

As a Director of WTC and CBF, the postholder will be an experienced trust professional with strong technical trust knowledge and fiduciary experience who is committed to proactive client service delivery, whilst managing risk and applying skill, care and judgement in exercising their duties.

As a senior member of the Wyoming team, the role will involve supporting the Managing Director in Wyoming and Jersey-based leadership team, to set up the office in Jackson Hole, implementing the

culture, structure, processes, systems and infrastructure to meet business, client and regulatory requirements and in accordance with the approach agreed by the Group Executive team.

Key Result Areas

- Act as a Director on the Board of Wyoming Trust Company, a state chartered public trust company regulated by the Wyoming Division of Banking, with good faith, honesty, care and prudence.
- Act as an authority on technical client specific matters.
- Provide excellent levels of client service in line with agreed standards, procedures and guidelines.
- Build strong and collaborative relationships with colleagues in Jersey to develop and implement appropriate processes and controls for the US business.
- Lead and manage the client service delivery team members in the US.
- Act as a role-model and ambassador for Crestbridge, maximising the contribution of Crestbridge Wyoming to the wider business, both through your own efforts and by managing, supporting and developing the team.
- Responsibility for the operational and financial performance of the client portfolio under your management.
- Develop and uphold a positive, strong, commercial and compliant culture within the business.
- Take responsibility for your own personal development, in line with agreed annual performance objectives.

Director Duties

- To act in good faith, with honesty, care and prudence.
- To exercise your powers for a proper purpose.
- To avoid conflict of interest and declare any such conflicts.
- To exercise the care, diligence and skill that a reasonably prudent person would exercise in comparable circumstances.

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:

Technical Expertise

- Act as 'relationship manager' on a portfolio of 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.
- Consult appropriate colleagues when undertaking work outside own area of expertise to ensure compliance, best practice, alignment to group approach 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 in the US and Jersey.
- Ensure that all training and professional development requirements are met for both you and all members of your team with relevant and cost-effective solutions.

Leadership and Management

- Management of a team responsible for client service and operational delivery.
- Develop commitment from your team and other colleagues through recognising good performance, providing timely and constructive feedback and leading by example.
- 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 colleagues with a particular emphasis on client matters, board and trustee decision making and fiduciary matters.
- Work collaboratively with senior colleagues in Jersey and the US to support, cascade and embed Executive and Board decisions, always behaving with the utmost integrity and professionalism.
- Demonstrate the ability to focus on the commercial needs of the business while acting responsibly and fairly towards employees, clients and intermediaries.

Business Development

- 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.
- Meet with existing clients and intermediaries to maintain and develop relationships and growth opportunities.
- Inspire confidence in new and existing clients by working with clients' key decision makers and influencers to build strong and effective relationships.
- Maintain relationships with clients and intermediaries, even when turning down work or clients choose to deal with competitors.
- Set very high standards of quality for service delivery and constantly strive to improve upon them through regular contact and timely responses.

Operations

- 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 team performance against budgets.
- Maintains a sound working knowledge of the use and impact of information technology and systems that are relevant to the business 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.
- Implement operational change and efficiency initiatives.
- Develop cost efficiencies through the introduction of new procedures, systems, working practices, improved financial management and other initiatives.
- Implement agreed changes within your business unit which can be directly linked to the increased profitability of the business.

Requirements

Qualifications

- Recognised Professional Qualification e.g. Accountancy, Legal, Chartered Secretary, STEP, CTFA, Banking, Securities or equivalent and a bachelor's degree in business administration, law, economics or a relevant discipline.

Knowledge and Experience

- Minimum of 8 years working at senior level within financial services, with strong fiduciary experience.
- Experience holding directorships.
- Deep and demonstrable knowledge of 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 and obligations imposed by the relevant Wyoming and Federal statutes and regulations affecting trust administration and Wyoming Public Trust Companies.
- A detailed understanding of corporate governance, compliance and risk management.
- Experience of managing people and 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.
- 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.
- Emotional resilience and results driven with a proactive and disciplined approach to work.

Additional Information

This is a unique opportunity to be involved at the start of a new venture, with the support of an established brand, reputation, team and existing client base.

Initially a key focus of the role will be to manage and deliver a client alignment project, maintaining continuity of client service as well as supporting the practical set-up of the office in Jackson Hole. As such we are looking for a candidate who is flexible and looking for a varied role with the ability to play a key role in the establishment and growth of our US team.

This role will be based in Jackson Hole with regular travel to Casper (likely to be 2 days per week initially) where the Client Service team, currently consisting of 4 people, are based.

