

Associate Director, Client Relationships and Growth

Job Description

Team: Client Handling/Business Development

Reporting to: Director, Client Relationships and Growth/CEO

The Crestbridge difference

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

Our specialist team work alongside HNW and UHNW 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 the USA.

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

You will play a key role in supporting the growth of the client base of Crestbridge Fiduciary by working closely with our Directors, CEO and Marketing and Business Development team to develop existing and new client and intermediary relationships. You will help to build the new business pipeline by developing relationships with existing and potential new clients and coordinating proposal documentation and new business pitches. You will manage the onboarding of new clients and support our administration teams to ensure opportunities to develop existing client relationships or win new business are identified and handled appropriately.

In addition, you will act as relationship manager on a portfolio of complex family office clients, proactively managing and pre-empting client needs to drive client service delivery. As a role model and ambassador for Crestbridge Fiduciary, you will promote a client service mentality and strong business development culture

across the business and maintain and, at all times exercising accountability to the Board and relevant stakeholders and applying skill and care in delivering your duties.

Key Result Areas

- Support the identification of new business opportunities, manage intermediary relationships and build the new business pipeline.
- Contribute to the delivery of agreed new business targets.
- Act as an authority on technical client specific matters and convey this expertise confidently in client meetings.
- Maintain and develop the profile, reputation and brand of Crestbridge Fiduciary internally and externally.
- Contribute to the overall strategy, structure and success of the business development function.
- Inspire confidence in new and existing clients by working with them to proactively build strong, effective and lasting relationships.
- Provide excellent levels of client service in line with Crestbridge standards, procedures and guidelines.
- Develop and uphold a positive, strong, commercial and compliant culture within your function.
- Be a role model and ambassador for Crestbridge Fiduciary, always acting in accordance with our core values.
- Take responsibility for own personal development, in line with agreed annual performance objectives.

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:

Business Growth

- Meet with new and existing clients and intermediaries to maintain and develop relationships and growth opportunities.
- Manage new business enquiries, to include co-ordinating new business proposals and pitch documentation for prospective clients and/or intermediaries.
- Act as a member of the BD Committee.
- Track new business leads and opportunities as part of the BD Committee.
- Participate in pricing discussions with other senior team members.
- Work closely with the marketing team to produce briefings, client case studies, collateral documentation, and team bios.
- Continually strive to create and build a strong market profile and promote the Company's services by attending relevant networking events and participating in other business development initiatives.
- Maintain relationships with clients and intermediaries even when turning down work or clients choose to deal with competitors.
- Share and communicate case studies and best practice to colleagues.
- Implement and deliver the key client/ intermediary programme as part of the BD Committee.

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.
- Inspire confidence in new and existing clients by building strong and effective relationships.
- Define client needs by listening actively to their requirements, providing solutions and anticipating needs beyond the existing relationship.

- Inspire confidence in new and existing clients by working with clients' key decision makers and influencers to build strong and effective relationships.
- Maintain current knowledge of the external business environment and relevant industry specific trends to provide sound and practical advice to clients.
- 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.

Technical Expertise

- 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 and minimise risk.
- Demonstrate sound judgment and professional scepticism when accepting instructions from new and existing clients, particularly when dealing with risk issues.
- Demonstrate knowledge of corporate governance requirements, internal compliance, anti-money laundering and other relevant policies and procedures.
- 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

- Demonstrate the ability to be entrepreneurial and innovative to drive the business forward while ensuring prudent control.
- Identify talent and develop high-potential people within the team.
- Communicate clearly and effectively, using authority and influence appropriately, and demonstrate the ability to lead and direct the efforts of others to achieve results.
- Encourage teambuilding, valuing 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 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 towards employees, clients and intermediaries.

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 and 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.
- Monitor performance of function against budgets and wider competitors.
- Maintain a sound working knowledge of the use and impact of information technology and systems that are relevant to the business of the Crestbridge and to its clients.
- Demonstrate commerciality and business acumen in relation to financial management, providing realistic and considered fee quotes and invoices for client work in a timely manner.
- Work with the leadership team to introduce operational change and efficiency initiatives within your business unit.
- Develop cost efficiencies through the introduction of new procedures, systems, working practices, improved financial management and other initiatives.
- Support change across the whole business, which can be directly linked to increased profitability.

Requirements

Qualifications

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

Knowledge and Experience

- Minimum of 10 years' relevant industry experience.
- Experience of growing and developing private client relationships.
- Deep and demonstrable knowledge private client administration and relationship management.
- Comprehensive understanding of trust and company law and current industry legislation, regulation and working practices.
- An excellent understanding of client financial statements.
- Experience of managing and leading people, driving high performance.

Skills and Qualities

- A strong commitment to client service excellence.
- Ability to develop client relationships, instilling trust, and confidence.
- Drive, energy and enthusiasm.
- Excellent communication and presentation skills with the ability to adapt your style to engage with a range of audiences.
- Approachable and accessible leader with the ability to inspire, motivate and develop others.
- Integrity, tact and diplomacy.
- Possess a commercial approach to business development, with a strong degree of business acumen.
- Emotional resilience and results driven with a proactive and disciplined approach to work.
- Strong communication and presentation skills.
- An ability to make decisions whilst managing conflicting and demanding deadlines.

Additional Information

This role will include regular off-island travel.

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.
- Annual leave entitlement of 28 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.*