Senior Client Director (Principal Person), Job Description

Team: Client Handling

Reporting to: Managing Director/Chief Executive Officer

The Crestbridge difference

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

Our specialist team work alongside high-net-worth and ultra-high-net-worth 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 act as the most senior technical director within the Client Handling team of Crestbridge Fiduciary, proactively managing and pre-empting client needs and driving the performance of the client handling teams. You will mentor and develop our client directors, and administration teams, driving proactive client relationship management and ensuring first-class service delivery to our clients.

As part of the broader Crestbridge leadership team you will embed and promote the vision, mission and values of the business, at all times exercising accountability to the Board and relevant stakeholders and applying skill and care in delivering your duties.

You will also work alongside our CEO and Client Business Development team to grow the business by acting as the technical expert in new client pitches and intermediary meetings.

Key Result Areas

- Act as the highest authority on technical client specific matters and convey this expertise confidently in all interactions with colleagues, clients and intermediaries.
- Proactive and value-add relationship management for key clients in the business.
- Inspire confidence in new and existing clients by working with clients' key decision makers and influencers to proactively build strong, effective and lasting relationships.
- Provide excellent levels of service in line with Crestbridge standards, procedures and guidelines.
- 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 the business as a whole.
- Mentor and develop the client director group.
- Contribute to the overall strategy, structure and prosperity of the client handling function.
- Work with the Client BD team to support business growth.
- Take responsibility for your personal development, in line with agreed performance objectives and development plans.
- Be a role model and ambassador for Crestbridge Fiduciary, always acting in accordance with our core values.

Principal Person Duties

- To act in good faith.
- 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:

Client Service Excellence

- Proactively develop and lead client strategy always maintaining and improving strong client satisfaction and profitability.
- Actively manage client retention and growth, measuring and maintaining client satisfaction.
- 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 working with clients' key decision makers and influencers to build strong and effective relationships.
- Define client needs by listening actively to their requirements, providing solutions and anticipating needs beyond the existing relationship.
- Lead and manage your team(s)to ensure they foster strong, proactive client relationships and high levels of service.
- Involvement in shaping client service delivery strategies.
- Maintain an excellent 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.

- 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.
- Lead and manage the client handling teams to ensure that they are also fostering strong, proactive client relationships and high levels of service.
- Share client needs and feedback across the client handling teams to help strengthen relationships and further build on the service provided.

Technical Expertise

- Demonstrate and be recognised as the highest authority, delivering 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.
- Act as 'relationship manager' 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.
- 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 communicates technical knowledge to the whole business.
- 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

- Provide on the job coaching to colleagues with a particular emphasis on client matters, board and trustee decision making and fiduciary matters.
- Demonstrate the ability to simultaneously be entrepreneurial and drive the business forward while keeping it under prudent control.
- Accountable for the actions of Crestbridge, leading and providing support to business unit managers in their day-to-day management of the teams.
- Develop commitment from your team and other colleagues through recognising good performance, providing timely and constructive feedback and leading by example.
- Identify talent and develops high-potential people within the team.
- Communicate clearly and effectively, using authority and influence appropriately, and demonstrates 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.
- Work collaboratively as part of the client director team 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.

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 build a strong market profile and promote Crestbridge's services by maintaining and developing strong external networks and relationships with clients and intermediaries.
- Share and communicate case studies and best practice to the whole business and externals where appropriate.

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.
- Prepare and submit budgets and monitor business unit performance 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.
- 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, TEP, Banking, Securities or other relevant Table 4 qualification.
- Likely to hold a bachelor's degree in business administration, law, economics, or a relevant discipline.

Knowledge and Experience

- 15 years' relevant finance industry experience with a minimum of 8 years working at senior level within professional services.
- Proven track record in area of expertise.
- Experience holding directorships.
- Comprehensive and detailed understanding of 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

- Ability to develop build and develop relationships with complex and demanding clients, instilling trust, and confidence.
- Excellent leadership skills, approachable and accessible with the ability to inspire, motivate and develop others, and manage underperformance quickly and fairly.
- A decision maker who gives the highest commitment to service excellent and corporate governance standards and can prioritise and deal with conflicting and demanding deadlines.
- Personal authority and gravitas to command respect and inspire confidence.
- Approachable and accessible leader with the ability to inspire, motivate and develop others.
- Ability to scrutinise and understand complex documentation.
- Ability to challenge the status quo, question and probe.
- Excellent communication and presentation skills to include the ability to pitch and present to a range of audiences.
- Persuading and influencing skills.
- Ability to define strategy and develop policy, procedures and processes.
- Integrity, tact and diplomacy.
- Commerciality with a strong degree of business acumen.
- Emotional resilience and results driven with a proactive and disciplined approach to work.

Additional Information

Our values are reflected in the behaviours we demonstrate every day:

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.
- Annual leave entitlement of 30 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.*