

## Recruitment of a Team Leader/ Private Client Administrator - Johannesburg

Maitland is an international firm providing wealth services to private and institutional clients. We provide the highest levels of expertise and competence working in a way that is uniquely personal, proactive and responsive. Family offices and institutions have trusted us since 1976 to preserve, manage and grow their assets. We work with our clients and not just for them, from offices in the British Virgin Islands, Cape Town, Dublin, Durban, Geneva, Isle of Man, Johannesburg, London, Luxembourg, Malta and Monaco. Maitland is one of the few wealth services groups with the breadth of knowledge and insight to create integrated, comprehensive global solutions.

An opportunity has arisen for a **Team Leader/ Private Client Administrator** to join our **Johannesburg office**.

### Summary of the position

The Team Leader/Private Client Administrator will perform various administrative and secretarial activities to assist with the administration of trusts and private client affairs, as well as assisting with certain aspects of the management of and supporting the other members of the Johannesburg trust team and, where necessary, other teams in the Durban and Cape Town offices.

### Outline of main duties and responsibilities

The Team Leader/Private Client Administrator will be expected to:

Provide additional managerial and administrative support to the Private Clients Transactional Services team and other teams in the office such as:

- Planning;
- Organizing;
- Staffing;
- Directing;
- Controlling.

Management and administrative support in relation to the Private Client Transactional Services workgroup regarding:

- Ensuring that required procedures and templates are in place and applied;
- Ensuring all systems are updated and utilized to their maximum;
- Supervising and implementing local office, service line and team projects;
- Supervising an on-going client review programme;
- Reviewing team workloads and ensuring that workloads are properly balanced;
- Ensuring staff are fully utilised;
- Ensuring back-up is in place in case of staff being on holiday, ill or absent for other reasons;
- Coordinating staff development and training;
- Assessing operational risk and working on solutions to mitigate same;
- Monitoring of and reducing operational errors;
- Compliance/ risk monitoring and management;
- Assisting in compiling budgets;
- Ensuring staff deal with internal requests in a timely manner;
- Managing performance within the team;
- Reviewing management reports received in order to effectively manage the team on a daily basis; and
- Other ad hoc activities as required.

Administrative duties relating to the administration of trusts and private client affairs, with some secretarial duties, to include:

- Attending to the administration of trusts, private client affairs and related matters, including but not limited to:

- Implementing instructions from the trustees, Key Account Managers and the Manager - Private Client Administration;
  - written and telephonic communication with intermediaries such as investment managers and banks (client and intermediary relationship management);
  - attending to the compliance requirements of the Master of the High Court, SARS and other compliance requirements, for example tax returns, FICA and FAIS compliance and so on;
  - entering data onto our client administration system;
  - invoicing fees, billing and debtors management;
  - regular file reviews;
  - assisting with or attending to the preparation of trust documents, and
  - working with colleagues based in other offices.
- Assisting with general trust and private client administrative functions such as the use of various IT systems, banking administration and so on;
  - Managing specific projects in the office as and when they arise;
  - File administration, including the opening of files, filing documents in both hard and soft copy, putting files to records and generally ensuring files that are kept in an orderly manner and up-to-date;
  - Answering the telephone and email, to deal with enquiries from clients, intermediaries, trustees, Key Account Managers and the Manager - Private Client Administration.

### **Skills and experience required**

The successful candidate will have a:

- Suitable commercial or legal qualification relevant to the duties and responsibilities listed below is an added advantage;
- Minimum of five to seven years' current experience in banking and/or trust administration including experience in administration involving the use of secretarial skills, experience of leading or assisting with the management of a small team and intermediary relationship management skills;
- Highly organised, efficient and professional with excellent administrative, organisational, and management skills;
- Ability to work confidently, proactively, use initiative, be decisive and to perform when under pressure;
- Capacity to work under supervision as a member of a team, to assist with the supervision of various operational and managerial aspects of a team and independently when required to do so;
- Excellent computer skills, the capability to learn new systems with confidence and in particular a good knowledge of Microsoft Office (2010) including Excel, Word and Outlook email and Experience using and building databases;
- Communication Skills, including the ability to communicate confidently and professionally with clients and intermediaries of the business and the ability to communicate effectively with staff and management and function effectively in a team while maintaining a positive attitude;
- Excellent telephone manner;
- Honesty and integrity of the highest order and respect for the confidentiality of clients' affairs;
- A flexible, dynamic and enthusiastic approach and an interest in the fiduciary services business;
- Own transport essential.

### **Reporting structure**

The **Team Leader/Private Client Administrator** will be part of the **Private Clients Transactional Services** business unit and will initially report the Team Leader – Private Client Administration during a transition phase after which they will report to the Manager - Private Client Administration.

### **Remuneration level**

Remuneration will be market related and commensurate with experience and seniority. In addition, the successful candidate will receive a competitive benefits package and be eligible to participate in the firm-wide discretionary bonus scheme.