ALBANY TRUSTEE

Employment Opportunity

Fiduciary & CSP Administrator
(seniority commensurate to experience)

About Albany Trustee:

- A team of over thirty-seven people with low staff turnover.
- Well-resourced, independent and owner managed.
- Dynamic, client focused collaborative team culture.
- GFSC licensed - Fiduciary and Protection of Investors.
- Internationally diverse HNW and UHNW clients & family offices.
- Multi-jurisdictional structures across range of entity types and asset classes.
- Specialism in family corporate governance.
- Over 50 years old - excellent track record and longstanding client relationships.
- Experiencing significant organic growth.

The Role

We are seeking to recruit within our client service team someone to be responsible for and administer a geographically diverse and varied portfolio of client trusts and companies which includes responsibility for managing client relationships and interacting with advisers as necessary.

The Candidate

The role will suit an ICSA or STEP qualified practitioner who has experience of managing a portfolio of clients within the fiduciary sector. We are looking for someone with:

- a sound understanding of applicable trust and company laws, rules and regulations applying to the Company's practice;
- strong company secretarial & bookkeeping skills;
- the ability to identify particular business, legal, financial, taxation and regulatory risks;
- a sound understanding of investments generally (across asset classes) which will include reviewing and assessing the performance of client investment portfolios for the purpose of reporting performance to underlying clients and comparing against peer group and industry benchmarks;
- managing challenging projects in a methodical and intelligent manner; and
- a good working knowledge of Acumen, or equivalent database (although this is not essential).

Duties, Responsibilities and Tasks

The role entails responsibility for managing the day-to-day operations of a portfolio of trust and company clients. This will include, amongst other things, and subject always to the overriding supervision and control of the Directors:

- meeting with clients when they are first accepted and when they subsequently visit the office or require meetings;
- responding to queries and information requests received from underlying clients, beneficiaries and settlors;
- liaising with intermediaries and advisors;
- preparing trust and corporate set up documents including memorandum and articles, settlement instruments and letters of wishes;
- preparing on-going minutes, corporate authorities, shareholder resolutions and statutory returns;
- maintaining and updating statutory records (both electronic and paper-based);
- bookkeeping transactions and maintaining financial records;
- invoicing client entities;
- contributing to the ongoing operations of the Company and other members of its group of companies by attending team and committee meetings as necessary and assisting with the development of the precedent documents, marketing materials, policies, procedures and best practice;
- ensuring adherence to statutory, regulatory and best practice requirements/guidelines in connection with Trust and Company administration pursuant to the policies and procedures manual as amended from time to time;
- ensuring that any CPD training requirements are met and recorded in the Company's records and that ongoing training us undertaken to ensure awareness, adoption and adherence to evolving statutory, regulatory and best practice requirements/guidelines;
- pursuing potential business development leads; and
- providing such assistance as may be required from time to time by the Directors to ensure the efficient running of the Company's office, the administration needs of clients are serviced in a timely and efficient manner and regulatory standards and best practice are met and adhered to.

Remuneration and Benefits

The position carries an excellent remuneration and benefits package including the following:

1. Competitive salary;
2. Membership of the Company's discretionary bonus scheme;

3. Private medical cover;

4. Private dental cover;

5. Pension;

6. Death in Service Benefit;

7. Staff car parking;

8. Generous holiday entitlement; and

9. Payment of professional membership fees.

Application Process

Please apply by email including full c.v. to Anthony Holt, Managing Director at a.holt@albanytrustee.com

All applications will be treated in the strictest confidence.