

## Director Job Description

Team:	Client Handling
Reporting to:	Chief Executive Officer/Managing Director

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### About Us

We are an independent and privately owned Family Office Services provider, based in Jersey and supporting clients all over the world. Since opening our doors in 2013 we've brought a fresh approach to our market, through our progressive, flexible, and service-focused offer. After a decade of growth, building a strong team, and earning a number of industry awards, we're now adding to our team, and are looking for people who would thrive in an environment where their voice, and their contribution will be invited, heard, and appreciated.

### The Role

To work with your fellow Directors to drive the client service delivery and team performance of the client handling teams, whilst working with the broader Crestbridge senior leadership team to drive the vision, mission and values of the business. To exercise accountability to the Board and relevant stakeholders and apply skill and care in exercising your duties.

In addition, you will play a key role in growing the client base of Crestbridge Family Office Services, by developing existing and new client and intermediary relationships. You will work closely with the BD and Marketing team on delivery of the Business Development strategy, as well as providing mentoring and development to our administration teams to ensure opportunities to develop existing client relationships or win new business are identified and handled appropriately.

You will discharge the obligations of a principal person satisfactorily and in line with defined business activities.

### Key Result Areas

- Provide excellent levels of client service in line with Crestbridge standards, procedures and guidelines.
- Act as the highest authority on technical client specific matters.
- Responsible for delivering agreed new business targets.
- Maintain and develop the profile, reputation and brand of Crestbridge Family Office Services externally.
- Identify new business opportunities, manage intermediary relationships and build the new business pipeline.
- Be a role model and ambassador for Crestbridge Family Office Services internally and externally, attending conferences, networking events and other relevant opportunities.
- Contribute to the overall strategy, structure and prosperity of your function.
- Oversee resourcing, retention, and development in your function.
- 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:

#### 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.
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- Demonstrate sound judgment and professional scepticism when accepting instructions from new and existing clients, particularly when dealing with risk issues.
- Acts as 'relationship manager' on a portfolio of the 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.

### **Business Development**

- Meet with new and existing clients and intermediaries to maintain and develop relationships and growth opportunities.
- Act as the first point of contact for new business enquiries, to include overseeing new business proposals and pitch documentation for prospective clients and/or intermediaries.
- Oversight and tracking of new business leads and opportunities.
- Lead 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 Group's services by attending networking events, speaking at seminars and conferences, writing articles and participating in other business development initiatives.
- 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.
- 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.
- Oversee the key client/ intermediary programme.
- Act as a member of the BD Committee.

### **Leadership and Management**

- 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.
- Generate innovative ideas that challenge the status quo but are strategically sound and encourage others to demonstrate innovation.
- Develop commitment from your team and other colleagues through recognising good performance, providing timely and constructive feedback and through leading by example.
- Identify talent and develops high-potential people within the team.
- Build commitment through fair, consistent and persuasive behaviour, championing ideas and setting realistic and challenging objectives through appraisal and other performance measurement initiatives.
- 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 values people, their ideas and opinions. Is approachable for all types of advice and is proactive in sharing knowledge.

- Provide on the job coaching to more junior 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 leading and 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 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, and to contribute to decision-making in relation to the introduction and development of IT systems to drive the Group forward.
- 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.  
To work with the leadership team to introduce operational change and efficiency initiatives both within your own business unit and in other functions.
- To develop cost efficiencies through the introduction of new procedures, systems, working practices, improved financial management and other initiatives.
- To drive forward change across the whole business, which can be directly linked to increased profitability.

### **Requirements**

#### **Qualifications**

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

#### **Knowledge and Experience**

- 15 years' relevant finance industry experience with a minimum of 8 years working at senior level within an offshore financial services organisation.
- Comprehensive understanding of company financial management with the ability to understand and comment on complex financial information.
- Comprehensive and detailed understanding of company law and current industry legislation, regulation and working practices.
- A detailed understanding of corporate governance, compliance and risk management.
- Experience of managing and leading people, driving high performance
- Prove private client BD experience working with family office structures.
- Established network of intermediaries with an existing profile in the middle east.
- Experience holding directorships.

#### **Skills and Qualities**

- Ability to develop build and develop relationships with complex and demanding clients, instilling trust, and confidence.
- 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 commands respect and inspire confidence.
- Excellent leadership skills, approachable and accessible with the ability to inspire, motivate and develop others, and manage underperformance quickly and fairly.
- 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

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.*