

Job Description

Job title:	Manager
Department:	Real Estate Services
Reporting to:	Directors
Persons to be supervised:	Real Estate Administration team
Location:	Jersey

The Role

Job Purpose

To manage, supervise and develop a team of administrators to ensure the provision of a professional and first class service to team clients. To maintain and develop relationships with team clients and to promote the positive image of Crestbridge through the professional application of services and knowledge. To be responsible for the administration of a portfolio of complex and crown jewel clients in line with the defined business activities. All tasks to be carried out efficiently and effectively, in accordance with Crestbridge's procedures.

Key Result Areas

- Provide excellent levels of client service in line with Crestbridge standards, procedures and guidelines
- Learning and people management
- Maintain and update client documentation accurately
- Take responsibility for own personal development, in line with agreed annual performance objectives
- To act at all times in accordance with Crestbridge values

Primary Contacts

- Own team
- Business unit director
- Internal departments
- Intermediaries
- Team clients
- Regulator when appropriate
- External auditors for own and team clients

Requirements

* Essential
+ Desirable

- Qualifications**
 - * Table 4 qualification
- Experience**
 - * 8 years' relevant industry experience
 - * At least 3 years' experience in a supervisory role
 - * Experience of developing and coaching others
- Knowledge**
 - * Working knowledge of Microsoft Office
 - * A comprehensive knowledge and understanding of local finance industry, legislation and regulatory requirement in which we operate
 - * Excellent understanding of client financial statements
 - * People management theory and practical application
 - * Performance management of a team
- Skills and Abilities**
 - * Persuading and influencing
 - * Leadership, motivation and delegation skills
 - * Presentation skills
 - * Decision making and with conflicting and demanding deadlines
 - * Building and creating a sense of team spirit and loyalty
 - * Handling conflict/differences
- Personal qualities**
 - * Integrity
 - * Inspires client and team confidence
 - * Adaptable and versatile
 - * Assertive and confident
 - * Discrete and tactful
 - * Emotional resilience
 - * 'Can do' attitude
 - * Role model
 - * Appropriate office conduct and attitude to work
- Motivation**
 - * Strong commitment to client service excellence
 - * Proactive and disciplined approach to work
 - * Results driven
 - * Progressive and takes responsibility for self-development and that of others
 - * Desire to promote the firms policy of equal opportunities and diversity in the work place, creating a working environment based on fairness, respect and positivity
 - * Competence in carrying out their role and the tasks and duties associated with their role
 - * Supervisory and people management skills



Key Responsibilities

Your role may include, but will not be limited to, the following tasks which we call 'Defined Business Activities'. The list of defined business activities is not exhaustive and may be amended from time to time:

Administration

- Responsibility for a portfolio of clients (including complex and crown jewel clients)
- Act as an Alternate Director of team client companies
- Act as a Crestbridge 'B' Authorised Signatory
- Travel to meet with own and team clients
- Liaise with team clients
- Delegate tasks as appropriate for own clients to team
- Comprehensive knowledge of the differing requirements/ processes for high risk clients
- Review of financial statements for team clients as appropriate
- Liaising with all intermediaries and external agents such as new business introducers, legal advisors, auditors and the JFSC in respect of team clients

Managerial

- Manage a team of administrators
- Monitor the team's performance, attendance and development
- Manage the workflow of the team
- Review all incoming and outgoing mail of the team
- Review and authorise all out going correspondence (any media) of the team
- Responsibility for the financial management of the team
- Responsibility for ensuring that team accounting deadlines and review deadlines are met Ensure team adherence to internal company procedures
- Development/enhancement of team specific procedures
- Attend board meetings
- Attend management meetings
- Conduct appraisals for team
- Participate in the recruitment process for your team
- Involvement in disciplinary or underperformance procedures
- Report and escalate any issues as appropriate
- Review development plans for teams

Development of others

- Presentation of internal short courses and training sessions
- Coach team in relation to client activities and Crestbridge procedures
- Coach team in relation to time management, financial management and prioritisation skills
- Conduct regular informal performance reviews
- Set and review performance objectives



Time management

- Prioritising own and team workflow
- Dealing with matters in a timely manner

Billings

- Analyse WIP for own and team clients
- Prepare BCF (billing control forms) and WIP (work in process reports) for team
- Send out invoices to clients
- Settling invoices
- Monitor and manage aged debts for team

Bookkeeping / Accounts

- Perform high level review of client accounts / financial statements

Meetings

- Scheduling meetings – delegating as appropriate
- Meeting requests – delegating as appropriate
- Attend meetings for own clients
- Attend meetings for senior team members clients by request

Board Pack Preparation

- Producing draft agenda
- Producing reports – delegating as appropriate
- Collating information – delegating as appropriate
- Circulating – delegating as appropriate

Minutes

- Drafting minutes and resolutions
- Delegating and reviewing minutes drafted by team
- Finalising of minutes and arranging for the signing of them

Checklists

- Preparing/delegating as appropriate:
- Draw down checklists
- Distributions checklists
- Investment checklists
- Power of Attorney checklists
- Client set up
- HRPTs
- MRPTs
- Client closedown/termination checklists

Periodic Reviews

- Conducting reviews on own clients (delegating part to team as appropriate)
- Review reviews conducted by team



Diary

- Inputting tasks – delegating as appropriate
- Completing tasks

New business

- Preparation of CARAs for own clients
- Assist with the client acceptance process for new clients

AML

- Requesting CDD documentation
- Understanding what is appropriate and acceptable