

PRIVATE CLIENT ADMINISTRATOR

Job Title	Private Client Administrator
Jobholder	New post
Salary Scale	Competitive
Working Pattern	9am – 5pm, Monday to Friday with one hour for lunch. However, other working patterns may be considered.
Job Purpose	We are looking for an experienced administrator or paralegal who is financially astute, pro-active and organised to manage financial and trust administration for our portfolio of private clients.
Management Responsibility for	None

Main Duties and Responsibilities

1. Trust Administration

- Assisting with the day-to-day administration involved in the management of private family and charitable trusts, including the preparation and attendance at regular trustees' meetings, production of working papers and meeting minutes.
- Registering trusts with HMRC and ensuring all compliance in relation to the trust is up to date.

2. Private Client Support

- Providing administrative support to the wider Private Client Team in:
 - processing inward and outward payments for and on behalf of clients;
 - arranging tax payments to HMRC on behalf of clients;
 - dealing with trust beneficiary income and periodic payments; and
 - assisting with the recovery of fees raised by the firm.
- Preparing regular cash accounts and statements for personal clients (training will be provided as required).

3. General Administration

- Identifying and resolving problems experienced by our clients in a professional manner.
- Adhering to the firm's processes in relation to time recording and compliance.
- Maintaining accurate records on the firm's document management system.

- Processing Anti-Money Laundering documentation and engagement information for trusts and other private client work.

Skills, Knowledge and Experience

- Previous experience in a similar role is desirable.
- Highly motivated and committed to delivering an excellent level of service to clients and colleagues.
- Ability to work independently as well as part of a team.
- Well-developed interpersonal, social and communication skills.
- Excellent organisational skills and the ability to prioritise tasks.
- Excellent numeracy skills.
- A high level of accuracy and strong attention to detail.
- A team player with a 'can do' attitude and common-sense approach.
- Ability to build professional relationships with clients and third parties.
- Proficient in the use of Microsoft Office applications, in particular Excel and Word.
- Genuine enthusiasm to continue developing both personally and technically.
- An eagerness to contribute towards the overall strategic objectives of the firm.

This job description provides an overview of the key duties and responsibilities for this role and is not intended to be exhaustive

If you wish to apply for this role, please send your CV and Covering Letter, via e-mail to recruitment@murraybeith.co.uk