2018/12/11

Role: Fiduciary Specialist

Title	Fiduciary Specialist
Employment Rate	Full-time

Location	Port Louis, Mauritius
Division	Wealth Planning & Corporate Services
Reporting to	Group Managing Director

REQUIRED QUALIFICATIONS	
Education	Bachelor of Commerce or Finance, tax qualification advantageous
Main Experience	More than 8-10 years' experience in financial services, investment management, banking, trust/fiduciary sectors.
Other Experience	• Very strong communication and marketing experience • Strong fiduciary background supported by general tax-legal experience in advising both clients and administrative / accounting teams • Knowledge of FSC capital market regulations in Mauritius, RSA, UK, BVI, Barbados • Financial degree or equivalent • Experience in Cross Border Taxation, legal/ contract structuring together with GBC's and other SPV's • Experience in dealing directly with HNW clients and supporting a cross selling strategy
Languages	English (others)

JOB PURPOSE
The purpose of the Relationship Manager role is to develop and maintain relationships with a portfolio of high net worth clients as well as institutional intermediaries. The role will be based in our Mauritius office. The ideal candidate will be an experienced fiduciary specialist and relationship manager and be the key contact between our client base and our Wealth Planning and

Corporate Services teams, ensuring effective management of client portfolio's and sustainability of our business.

RESPONSIBILITIES
Duties/Tasks
Main responsibilities: • Provide technical legal support and expertise to our Wealth Planning and Corporate Service teams on aspects pertaining to all our financial solutions including but not limited to fiduciary structures, wealth planning vehicles, Tax and global business solutions • Draft proposals and attending private and intermediary client meetings • Assist with recommendations in terms of relevant financial solutions proposed to our clients • Drive new business and manage client relationships with quarterly reviews • Research on various jurisdictions and legal requirements for incorporating structures • Provide training on technical aspects as required to the administration teams • Serve as director for clients • Working closely with then compliance team to ensure effective compliance reviews Manage existing client portfolio's: • Maintain existing client relationships via regular phone calls and meetings • Provide expertise – gain working knowledge of all GMG offerings and advise clients accordingly • Assist with technical queries raised by Trust/Administration Teams • Consult with clients re business continuity planning • Track action items and ensure client is kept updated • Research and resolve escalating issues • Communicate and supervise administrative teams regarding client needs • Receive and review Quarterly reports from Finance/Administation Teams and provide comments on billing etc. • Responsible for Profitabily and Billabilty for portfolio – review quarterly reports and implement action where necessary • Responsible for debtors • Understand current FATCA and CRS regulations and keep abreast of changes in these areas and inform clients of specific implications.

To apply for this position, please email recruitment@gmgfinancial.com.