

## **Futuregrowth has a vacancy for a Client Services Manager in the Client Services team**

*Preference will be given to suitably qualified previously disadvantaged candidates who add to the diversity of the company at all levels, and to permanent staff who apply for the position.*

### **Purpose**

To manage and enhance the client experience for all Futuregrowth clients by managing the delivery of client services to specific clients, managing the Client Services team and facilitating client service across other teams, in particular the business development team. The incumbent will report to the COO, Barron Africa.

### **Clients**

- Institutional clients;
- Administrators, consultants and auditors of institutional clients;
- Business Development;
- Portfolio managers; and
- Internal teams.

### **Responsibilities**

- Management of the Client Services team
  - Ensure efficient functioning of processes within the client services team;
  - Management and development of staff;
  - Coordination of regular team meetings and staff coaching sessions;
  - Monitoring and review of team budget;
  - Actively manage, improve and report on team performance metrics; and
  - Drive and implement all Client Service team projects and strategic initiatives.
- Client reporting
  - Management of all client reporting for all clients: Futuregrowth segregated, pooled, CIS and partnerships, as well as, oversight of OMIG funds (client daily reporting, monthly and quarterly reporting and all regulatory and ASISA reporting);
  - Daily client cash flow monitoring and cash flow processing;
  - Management of partnership portfolios;
  - Monthly recon of fund and client statements;
  - Assist with audit queries;
  - Assist with preparation and review of annual financial statements; and
  - Overall oversight and review of all client reconciliations (cash, call and scrip).
- Management of relationship with outsource third party administrators of partnerships.
- Management of relationship with custodians and trustees.
- Management of client service operations
  - Facilitate smooth workflow within team;
  - Assist Client Service Officers with client query resolutions when required;
  - Oversee the client take-on process;
  - Facilitation of asset transfers and transitions to/from clients;
  - Compile monthly reports, i.e. assets under management, cash flows, etc.; and
  - Review of tax computations (life four funds tax) and collection thereof.

- Work closely with business development team
  - Assist with client fee process, in respect of taking on clients;
  - Assist with key or significant client strategies and resolution of key issues;
  - Part of the core team to map the client journey;
  - Assist with client due diligence and report backs;
  - Review of client mandates and key operational SLAs;
  - Update of CRM systems and process, and monitoring of client service standards;
  - Client error monitoring and overdraft monitoring process; and
  - An active member of key operational forums, including but not limited to, OPSCOM, Project Sterco, Fee committee, Focus client group, CURO and OMIG Interface Office, etc.

## **Technical/professional knowledge and skills**

- B Com Hons or similar qualification with a focus on financial subjects;
- In depth understanding of client service operations within asset management, with at least 3-5 years in managing operational teams with a strong client centric focus;
- Good experience in asset management portfolio administration, including client reporting, NAV pricing, or specialist administration, for both segregated and pooled funds;
- Strong technical knowledge of client administration transactions, as well as, financial instruments;
- Relevant experience in fixed interest administration;
- Experience in pooled pricing and life tax would be a significant advantage;
- Project management skills;
- Proficiency in Hi-Port and InfoStore would be advantageous; and
- Advanced knowledge of Excel.

## **Competencies**

- Client focus;
- Leadership and management skills;
- Building and maintaining relationships;
- Communicating effectively (verbal and written);
- Teamwork and collaboration;
- Displaying drive and purpose;
- Adaptability;
- Analytical and problem solving skills;
- Planning and organising skills; and
- Quality orientation.

## **Closing date**

TBC

Please forward detailed CV, copies of ID and transcripts to [nsteenkamp@futuregrowth.co.za](mailto:nsteenkamp@futuregrowth.co.za)