

## JOB DESCRIPTION

Job Title | Assistant Manager– Trust  
Reporting to | Manager - Trust  
Location | Guernsey

### About ZEDRA

ZEDRA is an international provider of Global Expansion, Funds and Active Wealth solutions.

Our experienced teams deliver tailored high quality advice to companies and family businesses expanding overseas on a range of global expansion, accounting, tax, global mobility, payroll and HR matters. We also support high net worth individuals and their families seeking diversified active wealth solutions, as well as asset managers and their investors. Our hands-on approach and entrepreneurial outlook helps our clients safeguard their assets and unlock their ambitions for growth, no matter how complex their challenges might be.

At ZEDRA we embrace an entrepreneurial spirit where employees are encouraged to see beyond their determined role and participate in a wide range of opportunities. We focus on providing a wide range of technical and practical support to all employees at every level.

ZEDRA recognises the need to develop and expand an employee's skill-set and encourages career growth, as well as supports a social culture too, with a local social event programme across each office that celebrates the companies' inclusive culture.

We aim high. We believe in doing more so that our clients can. **Do More. Achieve More.**

### Purpose of Role

The Assistant Manager will take direct administrative responsibility for a complex portfolio of trusts, companies and other wealth structures ensuring that first class service is provided to clients, intermediaries and other stakeholders. The role holder will identify and mitigate risk across their span of control and will be responsible for assisting with the management of their team providing training and coaching.

### Key Accountabilities

#### Client

The effective Assistant Manager will take responsibility to ensure that they deliver high quality service to all clients, intermediaries and stakeholders, to ensure longevity of relationships and providing technical and other support to their team. They will interact directly with their clients to identify client needs and deliver upon opportunities to increase levels of client service as well as seeking to identify new business opportunities. The role holder will ensure they deliver on client commitments to agreed deadlines and to a high standard.

#### Commercial

The Assistant Manager will achieve personal targets as set out for their role for time recording, utilisation and working capital management. They will support their Director in understanding and acting upon the commerciality and profitability of their client book by reviewing and controlling WIP, ensuring prompt collection of fees and highlighting revenue opportunities. They will support their team in coaching more junior colleagues to build understanding and familiarity with the working capital cycle and prompt collection of debts.

#### Risk

The role holder will have an awareness of risk policies and an understanding of how these are applied to client and business situations. They will have an awareness of the different risk roles undertaken within ZEDRA. Successful Assistant managers will work within defined parameters will ensure that the team meet their risk targets.

#### People Management

The role holder will assist the Manager in managing the team by providing constructive performance feedback to each member of their team in order to develop and grow the individual and will carry out periodic Performance Appraisals of the members of their team. The role holder will also provide appropriate training and coaching to their team members.

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## Knowledge and Experience

### Professional and Technical Experience

The successful applicant will have experience of working with High Net Worth clients and on complex structures within the fiduciary field and will demonstrate first class client service delivering against the needs and demands of their clients. They will demonstrate excellent technical competency and an ability to impart that knowledge to others effectively, with a proven track record in technical and complex transactions for their clients. An Assistant Manager is expected to have a sound knowledge of current issues affecting fiduciary structures and the clients for whom we act.

### Personal Attributes

The successful Assistant Manager will put their clients at the centre of everything they do, building relationships and exceeding expectations, they will be flexible and professional when working under time driven pressures and will have good prioritisation and time management skills. They will be self-motivated and focused on exceeding targets and goals and be supportive and respectful to team and colleagues.

The successful applicant will demonstrate excellent Zedra Values and furthermore have a high level of personal and interpersonal skills, building relationships with both clients and colleagues

### Language Skills

The successful candidate will be fluent in English and an understanding of other languages is desirable.

### Academic and Professional Qualifications

The Assistant Manager is expected to hold a relevant professional qualification (such as STEP or ICSA or similar), and to be educated to A-Level standards, or equivalent.

The Assistant Manager will maintain the relevant Continued Professional Development (CPD) hours in line with your relevant qualification.