

Title: Family Office Client Services Executive
Department: Walgate Family Office Services
Reporting to: Head of Walgate Family Office Services

fladgate
unlimited
partnership

Walgate Family Office Services

This is a fantastic opportunity to join a dynamic, fast-growing team providing professional management services to private clients and their businesses.

Walgate is owned by the well-known law firm Fladgate LLP. It was established to provide services that support and complement the premium legal advice Fladgate provides. We like to say that we are 'powered by' Fladgate – meaning we benefit from the collective experience, professional rigour, client confidentiality and pragmatism that, since 1760, has been key to Fladgate's success.

Role Responsibilities

Your role, as a Family Office Client Services Executive, is to provide an excellent service to clients through solution-based support, inspiring trust and confidence and being actively engaged in clients' issues.

- The role involves managing a wide range of client matters including but not limited to:
- project management including professional advisor coordination and client representation
- company secretarial work including completion of Companies House forms and filings, updating statutory books and drafting resolutions, meeting minutes and other relevant documents
- Bank account opening
- Client financial administration
- KYC management
- Document management including transferring attachments to appropriate electronic folders, using uniform and accurate document descriptions

General responsibilities include:

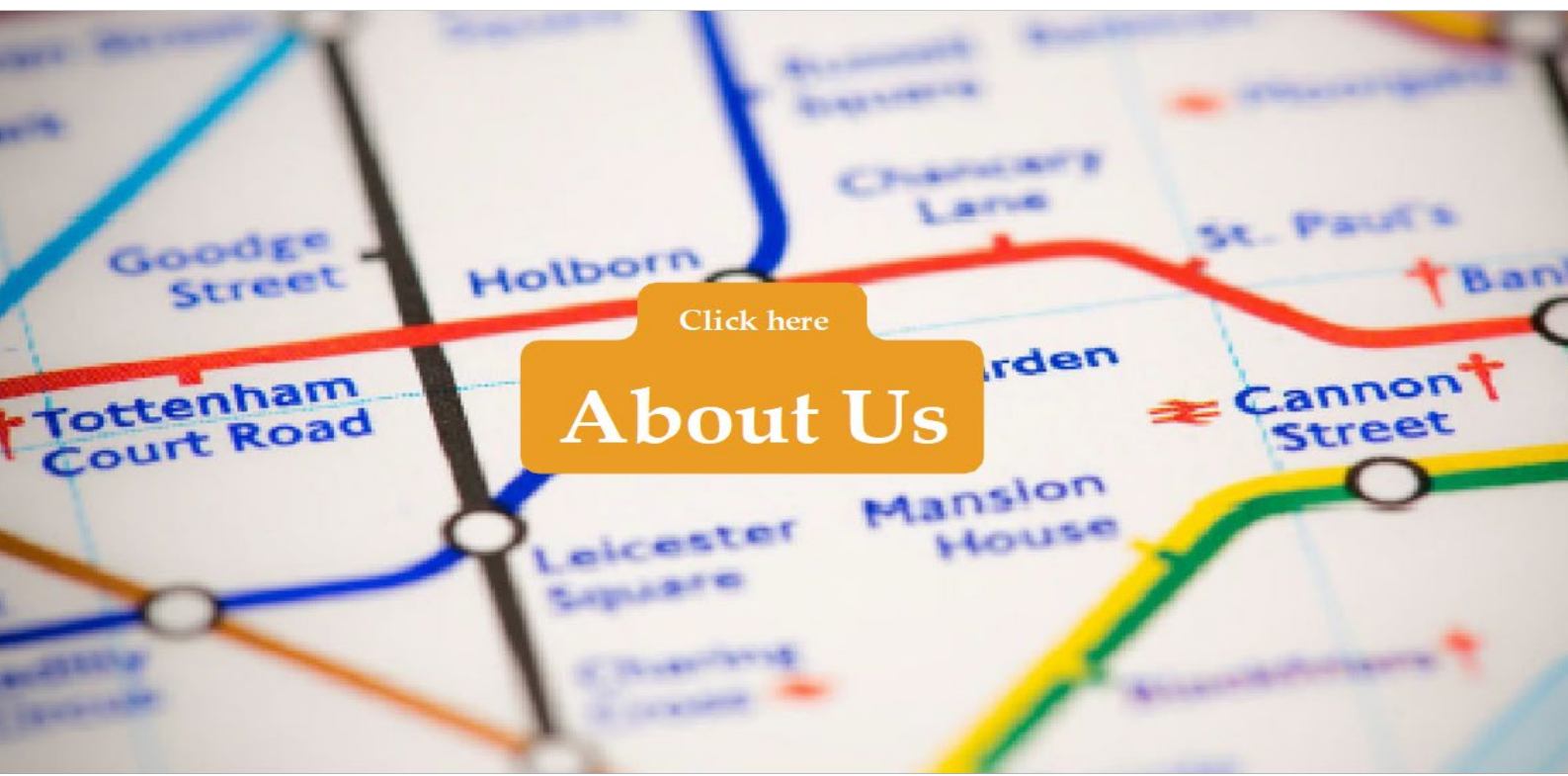
- Dealing directly with clients and taking primary responsibility for projects or specific tasks
- Assisting with business development activities
- Working closely with the Head of Walgate Family Offices as well as senior Fladgate partners and associates and managing workloads and regularly competing demands on your time;
- Meeting financial targets; and
- Keeping up to date with developments in the private client market, attending training sessions and industry seminars.

PERSON SPECIFICATION

We are looking for a talented Executive with the expertise to manage and support our entrepreneurial client base. Our ideal candidate will have many of the following skills and attributes:

- At least 3 years-experience working as paralegal ideally in the private client field but not essential or as part of as part of the finance / administrative team of a single or multi-family office team;
- A demonstrable track record of excellent client care and direct client contact;
- Ability to manage conflicting priorities and deadlines in a flexible and proactive way;
- Committed to ongoing learning and development including getting involved with business development activities
- An organised self-starter with proven analytical and problem solving skills with the ability to use your initiative and work independently;
- A flexible attitude and the ability to work effectively as part of a diverse and inclusive team;
- Previous customer service experience;
- Highly numerate with excellent written, verbal and interpersonal skills to effectively deal with clients;
- Detail orientated and demonstrated ability to meet deadlines;
- Flexible, innovative and displays control while working in a pressurised environment;

We are looking for an individual who will bring energy, drive and enthusiasm to this role and act as an ambassador for Walgate Family Office Services.



BENEFITS

We reward our staff for their continued commitment to the success of this Firm with a comprehensive range of benefits. Fladgate have also adopted a hybrid model of both office-based and home working which is a discretionary benefit depending on the role and responsibilities.

ON JOINING

- Life assurance scheme – 5x annual salary (non-contributory)
- Annual holiday entitlement – 26 days per calendar year (full time)
- Flexible holiday scheme – buy up to five days extra holiday per annum
- Staff introduction bonus – £1,000 - 5,000 depending on vacant role
- Personal training/yoga – free weekly sessions
- Free online GP service – 24/7 video GP consultations

AFTER 2
MONTHS

- Group personal pension plan of 4% - 5% employer contributions
- Matching employee contributions of 4% - 5% (automatically enrolled)
- Processed via salary sacrifice 50% of employer NI savings added to contribution

AFTER 3
MONTHS

- Company sick pay scheme
- Group income protection
- Season ticket loan
- Private Dental Plan – payable through monthly payroll
- Gym membership scheme – interest free gym membership loan
- Eye test vouchers – every two years

AFTER 6
MONTHS

- Private medical insurance (PMI) for employee cover is employer-paid, however additional family cover is employee-paid

At Fladgate, we recognise the importance of an agile approach, not only in the way we work with our clients, but our employees also. Hybrid working at Fladgate varies depending on your role and responsibilities. As a general rule, for those who can work from home and have roles compatible with home working, we operate a hybrid pattern of two days remote working and three days office based.



Our aim

To create a culture where our people can thrive and feel supported at work. As such, the Firm's approach to parental leave is designed to ensure that anyone who is a parent or is expecting to be a parent has a positive experience prior to parental leave, during their parental leave and upon their return to work whichever type of leave they decide to take.

Our parental leave policies* cover:

Maternity – We offer both statutory maternity pay (SMP) and enhanced maternity pay (EMP), subject to eligibility*. If eligible, EMP provides 100% of your salary in weeks 1-16 and 50% of your salary in weeks 17-28. Weeks 29-39 are at the government set rate (or 90% of salary, whichever is lower). In order to receive EMP, you must undertake to remain continuously employed by the Firm and to return to work for a period of at least six months from the date of your return to work before providing and notice of resignation*.

Paternity – We offer enhanced paternity pay (EPP) as full basic pay for up to three weeks*.

Shared Parental Leave – SPL allows parents to take up to 50 weeks' shared leave in total following the birth or adoption of a child*.

Adoption and Surrogacy*

Ordinary Parental Leave – Allowing up to 18 weeks unpaid leave for employees who have parental responsibility for a child / children*.

* Full details can be found in our staff handbook, which will be provided upon offer of employment.





Our focus

We know that to achieve our inclusion and diversity objectives we need to focus on a number of areas:

Developing a diverse leadership – We have a mix of different ethnicity and genders on our leadership groups. We are working hard to improve the gender balance of our partner team and we are striving for 30% female representation by 2025.

Attracting a diverse workforce – This means adopting a properly personal approach when connecting with those interested in joining our team including: ensuring fairness in our processes; working with those, like recruiters, who help us in this; a commitment that you will always meet male and female talent in our recruitment interviews.

Engaging with everyone in our team to ensure they are heard, supported and understood. Encourage everyone to develop their own voice in shaping our culture, their future and our service to clients. That might be working flexibly or that might be a specific career programme - everyone needs different things at different times.

Helping all our people in all roles to achieve their full potential. We provide training, coaching, internal mentors and buddies, whatever works for each individual and their own personal development path.



“As the I&D Partner Lead of the Firm, I am acutely aware that our vision and values are built around the word ‘personal’. We are a people business dependent on brilliant client relationships. Inclusion and diversity objectives are therefore not ‘soft’ business aspirations, they are fundamental to our success”

Helen Curtis-Goulding
I&D Partner Lead

[Click here](#)

I&D at Fladgate

WELLBEING

The Firm recognises the importance of the health and wellbeing of all our people and that it can play a part in promoting an environment which allows everyone to flourish and reach their full potential.



- Bupa private medical insurance (optional benefit to join after six months' service)
- Optional dental insurance
- Eye care vouchers
- Flu jab vouchers
- Weekly personal (group) training or yoga sessions
- Gym membership and fitness activity discounts
- Cycle to work scheme
- Menopause care via Stella app



PHYSICAL HEALTH

- Employee Assistance Programme (EAP), available 24/7 and 365 days a year
- Counselling and CBT sessions available via the EAP
- Annual holiday entitlement and flexible holiday scheme, with the opportunity to buy up to an additional weeks' holiday
- Resilience and stress management training
- Mental health awareness talks and training sessions
- The option to mix office-based and home working as a regular pattern of your working week



MENTAL HEALTH

- Group personal pension and group income protection scheme
- Life assurance (5x annual salary) scheme
- Season ticket loans
- Fee-earner bonus scheme
- Client introduction bonus scheme
- Recruitment bonus
- Access to everyday lifestyle discounts, via the Vivup app
- Financial management workshops inc. mortgage and pension management



FINANCIAL HEALTH

- Sports and social events, organised by our Sports & Social Committee throughout the year inc. summer and winter parties, bowling nights and quizzes
- CSR committee and fundraising activities
- Flexible working policy
- Loyalty holiday bonus, rewarding long service
- PRIME work experience opportunities
- Student mentoring for LPC and GDL students at the University of Law



SOCIAL & CSR