

Client Support/Administrator

Insight Capital

Insight Capital B.V. is an independent fund management company specialising in multi-manager funds and multi-asset Investment. The company is looking to recruit a Client Support/Administrator to work in its Den Haag office.

Role Title

Client Support/Administrator

Role Overview

This is a varied role and is suitable for someone who enjoys speaking with potential clients over the phone, provide back office support, attend client meetings and perform general office administrative duties, has good communications skills and attention to detail. This is a great opportunity to establish a career within our ambitious and rapidly expanding business.

Client Support

- Calling potential clients to introduce the company and its services
- Service incoming calls from clients in a professional manner
- Provide complete client service and account management, including but not limited to the following key accountabilities;
 - Execute trades on client account open request (e.g., the purchase of funds)
 - Facilitate customer investment transfers into the funds and perform required account maintenance
 - Provide general and specific information on accounts and products, transaction status, research reports, etc... upon request
 - Respond to web navigation queries, assist online trade execution and provide basic technical assistance as required
 - Account opening and account maintenance processing including working with clients to accurately and thoroughly complete appropriate required documentation as required
- Participate as required in outbound calling campaigns to grow the overall business
- Provide quality control to seal contract with potential clients
- Act as a secondary contact to service individual client requests when their assigned Relationship Manager is not available
- Meeting and greeting clients, being the face of the company for initial greeting
- Prepare meeting pack in advance of Director and Relationship Managers client meetings
- Processing client applications, switches, and withdrawals, via Director
- Liaise with clients to obtain missing or additional documentation
- Ensure Know Your Client details (KYC), full security and ID checks are completed in line with procedure
- Review KYC periodically
- Email monthly FundReview of funds to client and potential clients
- Send out welcoming emails to new account clients

- Liaise with Compliance regarding any account queries, ID inconsistencies or any suspected fraudulent activity
- Keeping client information up to date
- Issuing month end valuations to clients
- Preparation of illustrations and analytics

Administration

- Provide administration support to Managing Director
- Process invoices
- Data Entry
- Scanning and filing
- General office administration

Profile

- Very strong administrative and organisational skills
- Excellent communication skills – written and oral
- Good interpersonal skills
- Excellent IT (MS office) and data entry skills
- Ability to work effectively; independently and in teams
- Ability to meet deadlines
- Excellent attention to detail / accuracy
- Strong desire to achieve results
- Ability to prioritize, and flexible in approach
- Enjoys working in an administrative role and dealing with institutional clients and high net worth individuals
- Trustworthy and loyal, seeking long term commitment to the role
- Honest, open and resourceful
- Friendly, good communication skills, able to get on well with anyone

Language Requirement

Native Dutch

Fluent English. Good knowledge of French and or German is a plus

Further Information

Role: Client Support/Administrator

Type: Part Time

Location: Den Haag

Hours per week: Max 32

Salary: Competitive + Bonus

Interested candidates should send their cv together with a covering letter to info@insightcapital.nl