



Corporate Services Manager

Clarien Corporate Services Limited (CCSL) is a division of the award-winning Clarien Wealth Management practice, specialising in corporate secretarial and corporate governance services geared to the needs of corporations, individuals and families with trusts, companies, or other entities that comprise their overall financial structure.

The Corporate Services Manager will drive business development and growth of the business, positioning CCSL as the corporate provider of choice. The incumbent will source and cultivate opportunities to broaden the client base, enhancing and growing the customer's experience and profitability of the business.

As the department lead, the Corporate Services Manager will also be responsible for managing, supervising the day-to-day operations of CCSL's business and providing the necessary leadership, direction and management for the Corporate Administration Team. The successful candidate will ensure all client work is completed per legal, regulatory and industry best-practice guidelines and that relevant policies and procedures are being followed by all team members.

Primary Responsibilities:

- Identify and actively engage potential clients, to understand their objectives and articulate where and how those needs could be met by CCSL; may do the same for existing clients in order to deepen wallet share
- Act as a key contact/lead relationship manager for clients on an ongoing basis, to monitor profitability, ensure satisfaction and drive incremental new business
- Responsible for the implementation and development of the sales outreach methodology and to implement new business initiatives within the team
- Execute Corporate Secretarial duties for a portfolio of key Bermuda-based clients
- Prepare agendas and papers, take minutes and draft resolutions/follow-up action
- Assist in drafting and review of a range of corporate documents and commercial agreements and advise on corporate legislation, practice and procedure
- Support with incorporation, amalgamation, licensing, registration, continuation and liquidation proceedings
- Liaising, where appropriate, with directors, officers, and management of client companies
- Maintain client company registers
- Assist with strategic planning, recruitment and development of the new company
- Development of policies, procedures, processes and, once they are established, identify and recommend on best-practice improvements to them, and ensure they are adhered to on an ongoing basis
- Provide oversight on corporate governance, internal controls and risk assessment
- Manage a team of corporate administrators and support staff on a day to day basis, conducting high level review of the team's work
- Support with business development including identification and pursuit of new clients, and support with onboarding of new clients as required
- Act as senior relationship manager with clients in respect of service delivery, ensuring that service excellence is provided within a timely manner
- Work alongside Compliance and Risk functions to assist with oversight of the management of business risks and development of risk management policy and controls, promote risk awareness within the business and foster a culture of compliance
- Assist with the incorporation of Bermuda entities
- Assist with the liquidation of Bermuda entities
- Communicate with the Bermuda Government and Regulatory Authorities as required
- Act as a technical mentor and coach, developing knowledge and practical capabilities and proactively managing and promoting the development of team knowledge and key skills
- Provide reports related to issues with time recording, variance billings, accounts receivables, AGMs, staffing, portfolio allocations, etc. and any such other reports as requested
- Plan and co-ordinate portfolio coverage during staff absences

- Follow up and maintenance of KYC and AML procedures, as well as FATCA and CRS procedures
- Assist with the management of financial matters relating to the corporate services business, including the review, issuing and/or payment of invoices; processing payment of invoices, and monitoring and pursuing aged receivables
- Promote regulatory compliance applicable to CCSL's corporate services portfolio of clients, including preparing risk assessments and client acceptance reviews, conducting periodic reviews, requesting and reviewing new and updated compliance documentation and information as required
- Provide support in other areas of the service offering.

The successful candidate must have:

Competencies:

- Technical proficiency
- Business acumen
- Collaborative leadership
- Integrity
- Interpersonal effectiveness

Minimum Qualifications, Skills & Experience:

- Demonstrated experience in a similar role
- Relevant Bachelor's degree and professional qualification from Chartered Governance Institute (Formerly ICSA) or a comparable equivalent
- 10 years of relevant professional corporate secretarial experience
- 5 years of excellent managerial experience
- Sound knowledge of and experience with Bermuda legislation, corporate processes and procedures as they relate to the regulation of Bermuda entities
- Experience with due diligence and AML procedures and reviews is essential
- Experience with INTEGRA (BMA online applications system) and Catalyst (Registrar of Companies online system)
- Experience with the incorporation and liquidation of companies
- Strong research and drafting capabilities
- Strong computer literacy, including being proficient in the use of the Microsoft Office Suite of applications; knowledge of Viewpoint would be an asset
- Strong project co-ordination and management skills with proven ability to complete tasks on an accurate and timely basis
- Experience working within a professional services organisation or a large corporate matrix structure
- Proven relationship building and client interaction skills; willingness to assist with business development
- Exceptional verbal and written communication, organization and time management skills
- Strong decision making skills
- Willingness to collaborate on ideas and assistance to other members of the management team within the team structure
- Willingness to work a flexible schedule, as required, while ensuring service excellence in a timely manner.

Clarien is an equal opportunity employer and offers a competitive compensation package commensurate with qualifications and experience.

Please submit a detailed cover letter and résumé no later than July 22nd, 2022 to:

Human Resources Department
25 Reid Street, Hamilton HM 11
P.O. Box HM 665, Hamilton HM CX
Email: jobs@clarienbank.com
Fax: + 441 296 7701

www.clarienbank.com | 441 296 6969
Point House, 6 Front Street, Hamilton HM 11, Bermuda

We sincerely thank all applicants for their interest. Only those candidates under consideration will be contacted.

Clarien Bank Limited, through its wholly owned subsidiary companies, is licensed to conduct bank, investments, corporate service provider and trust business by the Bermuda Monetary Authority.