
JOB DESCRIPTION

Job Title: Private Client Manager

Grade: D

Department: Private Client Team, Client Relations

Main purpose of job:

This role is an account manager for our Charitable Trust (CAF's donor advised fund/DAF offering) clients. You will work with a portfolio of high and ultra-high net worth individuals, providing them with an exceptional service, building trust, and enabling smooth processing of their charitable grants to organisations around the world.

The Private Client Manager is the external face of processes handled by multiple internal teams, including the administration and due diligence required for receiving funds, making grants out and arranging for investments and other financial transactions. We also have an impact team, which the PCMs liaise with to provide advisory support to our clients. The PCMs need to understand the full spectrum of processes and services and be able to communicate requirements and timelines to clients, as well as ensure that any client request is efficiently dealt with as it progresses through these different teams.

Responsible to: Senior Private Client Manager

Budgetary responsibilities: None

Responsible for: None

Key Job Responsibilities:

- Develop strong relationships across a book of ~40 Charitable Trust donors – mainly (U)HNWIs, delivering high quality client service, both proactive and responsive, to ensure that clients are always highly satisfied and engaged.
- Develop detailed knowledge of CAF's full range of services and the wider impact economy in order to assist donors with developing their desired philanthropic strategies for charitable giving by ensuring that proposed solutions meet client's requirements and are also commercially viable for CAF.
- Proactively promote and increase the take up of the range of services that CAF offers to existing and prospective clients, both directly and via a range of introducers.
- Maintain a full understanding of the principles and practice (both external and CAF) in relation to the operation of donor advised funds; in particular relating to charitable donations, investments, complex gifts of non-cash assets, and complex grants and investments including grant agreements and social investment.

- Contribute to business development activities, such as presenting to referral partners and handling incoming enquiries.
- Continuing education through seminars, conferences and related training to promote skills growth and development, and raise CAF's profile.
- Ensure effective use of CRM, including maintaining accurate and up-to-date records about clients and their transactions.
- Be proactive in the suggestion and development of new work processes and procedures, assisting with the implementation of solutions where required to continually improve customer service.
- Diligently manage the formation of donor advised funds and process transactions in accordance with legal/regulatory requirements and corporate policy – e.g. KYC, AML, GDPR and advised/non-advised communications.
- Champion excellent client service across different internal stakeholders, providing client and partner feedback and insight to continuously improve CAF's products and services
- Participate in the performance management system by:
 - Achieving personal and team goals as agreed with Line Manager.
 - Giving and receiving feedback
 - Gathering evidence to support performance
 - Supporting less experienced team members with training and guidance as required.
- Ensure discretion and confidentiality in all matters.

CAF Values and Behavioural Indicators

The CAF Values and Behavioural Indicators set out in a transparent and consistent manner the explanation of the performance expectations of all CAF People. Through the use of common language and common standard, it combines a set of behaviours with the required technical skills and knowledge needed to effectively perform in any given role in CAF. This is used for the assessment, management and development of performance of all our people across CAF

Please refer to the link: [CAF values and indicative behaviours](#) for the CAF Values and Behavioural Indicators.

Date: August 2025

PERSON SPECIFICATION

Job title: Private Client Manager
Date: August 2025

Attributes	Essential ✓	Desirable ✓	How Evidenced ⁺
Experience Proven track record of relationship managing a portfolio of HNW clients. Experienced and confident at prospecting and networking with potential new clients.	✓	✓	A/C A/C
Qualifications Appropriate professional qualification or Degree/Post Graduate qualifications.		✓	
Training Sales training Financial services		✓ ✓	A/C A/C
Specialist Skills/ Ability/Knowledge Ability to build and maintain relationships Demonstrate ability to successfully negotiate and influence Ability to display working understanding of financial industry and regulatory requirements including Charity Commission guidance, Charities Act, Trustee Act. Computer literacy	✓ ✓ ✓	✓	A/C A/C A/C A/C A/C
Communication Excellent verbal and written communications Excellent presentation skills to small and large groups	✓ ✓		A/C/T A/C/T
Personal Qualities Strong communication and negotiation skills Commercially astute Open to new ideas and challenges Positive, outgoing and confident Self motivated, committed and ambitious	✓ ✓ ✓ ✓ ✓		A/C A/C A/C A/C A/C
Special Conditions Additional hours as required Willingness to travel throughout the UK.	✓ ✓		C C
Prior to Appointment All posts: <ul style="list-style-type: none"> Credit Check Sanctions Check Basic DBS Check Employment References Medical Clearance 	✓ ✓ ✓ ✓ ✓ ✓		R/E

<ul style="list-style-type: none"> Right to Work in the UK 			
FCA Approved Posts: <ul style="list-style-type: none"> Standard DBS Check 	✓		

✓ Tick either the *Essential* or *Desirable* column as appropriate for each attribute

† Insert the code from the key below for how you intend to assess this requirement e.g. at interview, via references etc.

Key

R = References, E = Evidence/Certificates, A = Application, C = Competency Interview, T = Testing/Assessment