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NA Head of Client Solutions, Total Portfolio Solutions

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Company: Northern Trust

Location: Israel

Category: other-general

About Northern Trust:

Northern Trust, a global company, is a globally recognized, award-winning financial institution that has been in continuous operation since 1854.

Northern Trust is proud to provide innovative financial services and guidance to the world's most successful individuals, families, and institutions by remaining true to our enduring principles of service, expertise, and integrity. With more than 175 years of financial experience and over 22,000 partners, we serve the world's most sophisticated clients using leading technology and exceptional service.

About the Asset Owner Segment, Americas:

This is a recently formed business segment within the Asset Servicing Division, responsible for roughly half of Northern Trust's total global assets under custody, as well as newly formed innovative businesses such as Northern Trust Front Office Solutions. This segment focuses on mission-driven asset owners across the Americas, primarily endowments, foundations, corporations, pensions, multi-national entities, and insurance companies. The creation of this segment, which merges Northern Trust's legacy business lines with its forward-looking products and capabilities, creates exciting and unique leadership opportunities to help us realize more optimal outcomes for our business, while working in close alignment with the other executives throughout the organization. This is an opportunity to transform how we serve our clients, partners, and stakeholders by leveraging the invaluable assets which exist within our people and our products, and applying forward-looking, human-centered design thinking and innovation to help us collectively achieve greater.

Our vision :

To be THE market-leading partner of choice in the asset owner segment through innovative products, unparalleled service, impeccable operational outcomes, and unyielding integrity and alignment to our clients.

We cannot do this without putting culture at the core. Our people, our behaviors, the decisions we make all influence the ability to achieve success. Diversity, Equity, and Inclusion is paramount to establishing of an environment which fosters positive results and positive experiences.

Total Portfolio Solutions is an exciting new evolution for Northern Trust and its asset owner clients, bringing together nearly partners around the world to focus on the data and insights our clients demand the most – portfolio accounting, alternative investments, and investment risk and analytics. The group demonstrates its expertise across several core products & services at Northern Trust, inclusive of a new and developing suite of Integrated Middle Office offerings to complex asset owners across the globe. The formation of this group offers our partners exciting growth, learning, and development opportunities across a wide variety of domains and functions.

The core values of Northern Trust (Service, Integrity, and Expertise) are central to everything we do for our clients. We have differentiated ourselves in the marketplace by investing in and offering distinct asset owner products & services, all delivered with the high-touch client service model our clients expect. The hallmarks of Northern Trust service include doing so always with integrity, and while bringing our expertise to bear, so that we may provide our clients with best practices, thought leadership, and market insights. Successful candidates for this role will have tireless energy, deep empathy, and exacting dedication to the pursuit of empowering the incredible missions of our clients.

Reporting to the Global Head of Total Portfolio Solutions, the NA Head of Client Solutions is responsible for leading service delivery for client relationships in the NA market; managing the regional team of Client Solutions managers and partners, and collaborating with Business Development, Portfolio Solutions, Portfolio Delivery, Client Implementation, and Business Operations teams, as well as cross-functional teams such as Sales, Product and Relationship Management. Owns overall accountability for the performance of their team and clients against plan in the region, within established risk tolerance and in compliance with applicable governance and regulations.

Major Duties

Active participation in the TPS Management team including contributions to strategy and the business's OKRs.

Leading and supporting a team of TPS Client Solutions partners, in line with plan and business and revenue growth.

Oversees, plans, and directs the activities of the NA Client Solutions team, ensuring that business objectives are being met, as measured through OKRs and plan.

Develops relationships with existing and potential clients to promote TPS.

Engages the rest of the bank through structured programs and personal relationships to maximize opportunities for TPS.

Partners with Client Implementations to successfully convert new clients onto TPS services and owns conversion to BAU at "go-live."

Partners with Portfolio Solutions and Portfolio Delivery to ensure client deliverables, SLAs, and KPIs are met; responsible for TPS' relationship with the client and for liaising internally with other Northern Trust teams servicing the client, principally Relationship Management.

Serves as the voice of the client in advocating for development of our software and services; partners with Product to shape our roadmap to drive client satisfaction and market competitiveness.

Ensures client development plans are in place and tracked for all NA TPS Clients; actively engages with clients as a strategic partner, while driving opportunities to grow the TPS relationship and cross-sell other Northern Trust services and products.

Leads engagement with NA governance forums, while leveraging global TPS resources, to ensure business activities are properly reviewed and understood by control, compliance and other stakeholders.

Oversees and proactively manages risk within NA Client Solutions, collaborating with and directing managers and leveraging global TPS resources; participates in TPS Risk Council.

Knowledge/Skills

Strong understanding of institutional investment industry, including markets, instruments, funds and fund structures, trading, etc.

Deep knowledge of alternative assets and related operational processes (hedge funds, private equity). Demonstrated understanding of private equity transactional impacts on unfunded commitments, market value, cost, and other metrics typically associated with private equity (TVPI, DPI, PIC, etc.).

Strong understanding of investment operational processes, transactional impacts, cash movement, accruals, and valuation methodologies.

Strong understanding of accounting/reporting methods, including IBOR, ABOR, and TruNAV to support complete and accurate data capture.

Knowledge of performance measurement concepts (such as attribution analysis) and standards (such as GIPS Standards).

Understanding of benchmarks and benchmark calculation methodologies across multiple asset classes, including blended and custom benchmarks.

Demonstrated ability to manage others: cultivating teamwork; providing leadership, direction, and guidance; and facilitating training and personal development.

Excellent communication and collaboration skills with an ability to communicate vision and purpose and bring people together around common goals.

Advanced knowledge of Microsoft Suite (Excel, Word, PowerPoint, Visio).

Applies knowledge of key business drivers and the factors that maximize department performance.

Persuades managers and leaders to take action and/or negotiates with external partners/ vendors/clients.

Ability to explain information, convey performance expectations, and handle sensitive issues.

Experience

Has experience managing; has experience coordinating resources and setting daily priorities to meet objectives.

Manages multiple related teams, sets departmental priorities, and allocates resources to align with business objectives and annual plan.

15+ years of institutional investment industry experience, with experience covering Fund Accounting, Investment Operations, Performance Measurement & Analytics, Alternative Investments, Financial Reporting, Investment Oversight & Reporting, and associated risk management practices.

Experience serving the needs of complex asset owners including Endowments, Foundations, Family Offices, OCIOs, Pension Funds, Sovereign Wealth Funds, and institutional asset managers.

Understanding of client servicing requirements and expectations, either through client servicing experience or direct client experience.

Prior work experience requiring considerable organizational, planning, project management, and prioritization skills.

Solid experience with the full range of communication skills – written and oral.

Prior experience with multi-asset class portfolio management software preferred.

B.A. or B.S. degree.

Advanced credentials – CFA, CAIA, MBA, or CPA highly preferred.

Working with Us:

██████████ partner, greater achievements await. You will be part of a flexible and collaborative work culture in an organization where financial strength and stability is an asset that emboldens us to explore new ideas.

Movement within the organization is encouraged, senior leaders are accessible, and you can take pride in working for a company committed to assisting the communities we serve!

Join a workplace with a greater purpose.

We'd love to learn more about how your interests and experience could be a fit with one of the world's most admired and sustainable companies! Build your career with us and apply today.

Reasonable accommodation

Working with and providing reasonable accommodations to individuals with disabilities. If you need a reasonable accommodation for any part of the employment process, please email our HR Service Center .

We hope you're excited about the role and the opportunity to work with us. We value an inclusive workplace and understand flexibility means different things to different people. Apply today and talk to us about your flexible working requirements and together we can achieve greater.

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