【外資系投資銀行】税務クライアントサービス（VP）｜証券・カストディ部門

日本のクライアントサポートチームのリーダー役

Job Information

Recruiter
Morgan McKinley

Job ID
1616275

Industry
Bank, Trust Bank

Job Type
Permanent Full-time

Location
Tokyo - 23 Wards

Salary
Negotiable, based on experience

Refreshed
November 3rd, 2026 17:00

General Requirements

Minimum Experience Level
Over 10 years

Career Level
Mid Career

Minimum English Level
Business Level

Minimum Japanese Level
Fluent Level

Minimum Education Level
Bachelor's Degree

Visa Status
Permission to work in Japan required

Job Description

東京の大手外資系投資銀行にて、証券サービス・カストディ事業を支える税務クライアントサービスのVPポジションです。

機関投資家のポートフォリオ資産に関する税務対応を中心に、税務オペレーション、カストディ、アセットサービシング、クライアントサービスの専門性を活かしていただきます。

日本チームのリーダーとして人材育成やパフォーマンス向上を牽引していただくので、将来マネジメントを目指したい方にも最適なポジションです。

主な職務内容

- 機関投資家のポートフォリオ資産に関連する税務オペレーション・ワークフローの管理
- 日本のクライアントサポートチームのリード（パフォーマンス基準の設定、人材育成、顧客志向の高いチーム文化の

醸成など）
- グローバル/リージョンのプロセス管理や効率化（英国、米国、インド、APACのTax Operationsチームと連携）
- カストディ取引・資金決済、アセットサービシング、トランジション、口座開設などに関する税務オペレーションの監督
- 日本における重要・複雑なクライアント税務案件の主要なエスカレーション対応
- リージョナルガバナンス会議への出席、サービス状況、リスク、課題、優先事項の報告
- オペレーショナルリスクの特定、根本原因分析、改善策の策定・実行、再発防止コントロールの導入
- データ活用、業務量分析、プロセス改善、サービスレベル向上の推進（プロダクト、IT、内部管理部門等と連携）

Join a leading global investment bank in Tokyo as a **VP, Tax Client Services**, supporting institutional clients across the Securities Services and custody business. This senior position combines **tax operations, custody, asset servicing, client relationship management, and operational leadership** within a complex international financial environment.

You will oversee end-to-end tax workflows for portfolio assets, act as the primary escalation point for critical client tax matters in Japan, and work closely with Tax Operations teams across the UK, US, India, and Asia-Pacific.

Beyond day-to-day operations, you will set performance standards for the local client support team, strengthen risk and control frameworks, and partner with Product, Technology, and Control functions to improve processes, data capabilities, and service quality.

Key Responsibilities

- Manage **end-to-end tax operations and workflows** supporting institutional clients and their portfolio assets within the custody and Securities Services business.
- Lead the local client support function, establish performance standards, and develop a high-performing, client-centric team.
- Partner with international Tax Operations teams across the **UK, US, India, and Asia-Pacific** to ensure consistent execution and streamline regional processing.
- Oversee operational activities across custody trade and cash, **asset servicing, transitions, account setup, and related tax processes**.
- Act as the primary escalation point for complex client tax matters in Japan, providing proactive support and helping clients achieve appropriate tax outcomes.
- Represent local operations in regional governance forums and communicate key developments, risks, service metrics, and priorities to cross-functional stakeholders.
- Identify operational and control risks, lead root-cause analysis and remediation, and implement preventative controls to maintain a strong risk environment.
- Collaborate with Product, Technology, and Control teams to develop **data-driven tools, analyse operational volumes, improve workflows, and enhance service levels**.
- Drive continuous improvement initiatives across the Asia-Pacific network while maintaining strong client relationships and operational standards.

Required Skills

必須条件 経験・資格：

- 証券・投資銀行、アセットマネジメントなどのオペレーション領域における実務経験が10年以上あり、カストディまたはアセットサービシングに関する知識があること
- または、金融業界における税務アドバイザリー経験があること
- 組織や業務プロセスの変革をリードした経験
- チームマネジメント、パフォーマンス管理、人材育成の実績

ソフトスキル：
- 内部統制意識
- 機関投資家と信頼関係を築けるコミュニケ―ション能力
- 複雑な議論や重要なエスカレーションに適切に対処できる判断力
- リーダーシップ

語学力：
- **日本語：**流暢
- **英語：**流暢

歓迎条件
- グローバル税務チームとの協働経験や、クロスボーダー業務の経験
- 金融サービスにおける業務改善、自動化、データ分析、テクノロジー導入の実績

採用企業について

大手外資系金融グループ。

100カ国以上で事業を展開し、世界有数の企業、政府機関、機関投資家に対して、投資銀行、キャピタルマーケット、戦略アドバイザリー、証券サービス、カストディなど幅広い金融ソリューションを提供しています。

この求人がおすすめの理由
- 大手外資系投資銀行におけるVPクラスの税務クライアントサービスポジション
- カストディ、アセットサービシング、税務オペレーションなど幅広い専門領域へのエクスポージャー
- APAC、英国、米国、インドなどのグローバルチームと日常的に連携できる国際的な環境
- 大規模な金融オペレーションにおいてプロセス、テクノロジー、リスク・コントロール改善をリードするやりがい
- チームマネジメントや人材育成を通じ、リーダーシップ経験を積める
- 継続的な学習、体系的なオンボーディング、部門横断型のコラボレーションを重視する企業文化
- フレックスタイム制あり、残業少なめ

転職のご相談もお気軽にどうぞ。 Required Skills and Qualifications **Experience:**
- **10+ years of experience in Investment Banking or Asset Management Operations** , with knowledge of custody, Securities Services, and/or asset servicing; alternatively, relevant tax advisory experience within the financial services industry.
- Strong understanding of operational processes supporting institutional investors, custody businesses, or financial services tax requirements.
- Experience managing complex operational processes and driving change within a regulated financial services environment.
- Proven experience leading teams, setting performance expectations, and developing high-performing talent.
- Experience managing client relationships and resolving complex operational, tax, or service-related issues.
- Understanding of operational risk, controls, governance, and continuous improvement within financial services.
- Bachelor's degree or equivalent university qualification.

Soft Skills:
- Strong **leadership and people management skills**, with the ability to build a client-focused, high-performance team culture.
- Excellent client relationship management skills and the confidence to handle complex or sensitive discussions with institutional stakeholders.
- Strong control mindset with the ability to identify operational risks, investigate root causes, and implement practical remediation.
- Excellent stakeholder management and collaboration skills for working across regional and global teams.
- Strategic and analytical mindset with the ability to use operational data and metrics to improve processes and service quality.
- Ability to lead effectively through change and manage multiple priorities within a complex international environment.

Language Requirements:
- **Japanese:** Fluent proficiency required for client engagement and local stakeholder management.
- **English:** Fluent proficiency required for collaboration with regional and global teams.

Preferred Skills & Qualifications
- Experience in **custody, Securities Services, asset servicing, or investment operations** within a global financial institution.
- Financial services tax advisory or tax operations experience supporting institutional clients or investment portfolios.
- Knowledge of custody-related tax processes and the operational lifecycle of securities and portfolio assets.
- Experience working with global Tax Operations teams or managing cross-border operational processes.
- Experience participating in regional governance forums and engaging with senior stakeholders.
- Track record of delivering **process improvement, automation, data analytics, or technology enhancement initiatives** within financial services.
- Experience managing operational change while maintaining strong risk, control, and client service standards.

About the Company
Our client is a **leading global financial services and investment banking institution** operating across more than 100 countries.

The firm provides strategic advisory, investment banking, capital markets, and Securities Services solutions to major corporations, governments, and institutional investors worldwide. Its global platform gives professionals the opportunity to work on sophisticated transactions and critical financial market infrastructure while collaborating across international teams.

The organisation places a strong emphasis on **risk management, client service, operational excellence, continuous learning, and cross-functional collaboration**.

Why You'll Love Working Here
- **Competitive compensation of ¥14M-¥17M**, alongside performance-based rewards and comprehensive benefits.
- Take on a senior **VP-level Tax Client Services** role within a leading global investment bank.
- Gain significant exposure to **Securities Services, custody, asset servicing, tax operations, and institutional clients**.
- Collaborate with international Tax Operations teams across Asia-Pacific, the UK, US, and India.
- Lead meaningful process, technology, risk, and control improvements within a large-scale global operation.
- Develop and mentor talent while shaping a high-performing, client-centric team.
- Benefit from structured learning opportunities and extensive cross-functional collaboration.
- Enjoy **flexible working arrangements, minimal overtime, and a casual dress environment** .

Don't Miss Out - Apply Now!

Company Description

Morgan McKinleyは国際的な人材コンサルティング会社として、さまざまな業界・分野をリードする採用企業様と、スペ

シャリストとしてのスキルを有する人材とを結びつけるお手伝いをしています。1988年の創立以来、Morgan McKinleyの名は、「卓越した質のサービス」「市場知識の豊富さ」「No.1企業であり続けようとする強い意志」、そして何よりも「実績」を体現する会社として知られています。

リクルーティング スペシャリストである弊社コンサルタントまでお気軽にお問い合わせください。