Handelsbanken
Wealth & Asset Management

Paraplanner- 15 month FTC

About Us

Handelsbanken Wealth & Asset Management is a wholly-owned subsidiary of the Handelsbanken Group and is responsible for all wealth and investment management activities of the Group in the UK. Founded in Sweden, Handelsbanken is one of the world's strongest banks and offers local relationship banking, advice and investment management to personal and corporate customers through its fast-growing network across the UK. For over 30 years we have been relied on by our customers, including business leaders and sophisticated financial professionals, to advise them and to manage their wealth. We focus on one objective – customer satisfaction – since a satisfied customer will be happy to both return and to recommend us.

This is an opportunity to join a successful and fast-growing national organisation with the added benefit of being part of a significant multinational group.

Handelsbanken Group are deeply committed to embedding good equality and diversity practice into all of our activities so that Handelsbanken Wealth & Asset Management is an inclusive, welcoming and inspiring place to work, regardless of age, disability, pregnancy and/or parental status, ethnicity, religion, sex, gender reassignment or sexual orientation.

Handelsbanken is offering a hybrid working model. Our approach to hybrid working at Handelsbanken is that we spend the greater proportion of our working time at our workplace. Our remaining time may be worked from home. This approach allows us to embrace the many benefits of hybrid working whilst sustaining and developing our unique culture.

We encourage and welcome applications from across the global community and all appointments are made solely on merit.

Remuneration

Competitive, depending on experience

Benefits include:

- Private Medical
- Generous Employer Pension Contributions
- Discretionary Profit Sharing Plan

Our Role

Working within the Wealth Planning team providing high level financial planning advice to Handelsbanken clients while also supporting the Client Directors with technical support. While heavily pensions dominated this area of the business continues to evolve. This role can be based in our London, Tunbridge Wells or Manchester offices.

Main Responsibilities

Working closely with our Client Directors, their Associates and the in-house tax team you will be responsible for the delivery of technical financial advisory reports and advice to High Net Worth Clients. The areas of advice will include:

- Work alongside Advisers to deliver a highly personalised holistic financial planning service, focused on improving all client outcomes and ensuring client needs are met to an exceptional standard.
- Undertake technical research, compile financial planning recommendations.
- Undertake a limited number of defined benefit pension transfer reviews.
- Attend meetings with Financial Planners, developing relationships with clients.
- Analyse client data and prepare cash flow analyses.

- Liaise with product providers and other third parties.
- Mentor, nurture and develop trainees.
- Ensure all regulatory and compliance standards are met.
- Contribute to the ongoing development of best practice within the business.

Person Specification

- High attention to detail, with strong written and oral communication.
- Genuine desire to provide an exceptional standard of advice and service to clients.
- A strong technology and mathematical aptitude with excellent attention to detail.
- The ability to manage workflow and tasks effectively.
- A strong relationship builder and collaborative team player with a caring and quality focused, customer centric approach.

Academic:

- Minimum Level 4 qualified – Diploma in Financial Planning/ Regulated Financial Planning.
- Preferably having achieved or working towards Certified &/or Chartered Financial Planner qualifications (support with this will be provided).
- Pension Transfer Specialist ideally. (AF7 or AF3)

Experience:

- Proven experience dealing with the financial planning advisory needs of high net worth private clients.
- This is a certified role. Ideally, you will have been certified in a previous role and held the relevant experience and qualifications to meet those requirements.
- Good knowledge and experience of all areas of financial planning essential - cashflow modelling, taxation, investment portfolio management, pensions, protection, estate planning etc.
- Experience of using FE analytics, Voyant and Defaqto is advantageous but not essential.
- Experience with both Defined Benefit and Defined Contribution pensions.

Contact

Please send your CV and covering letter to careers.hwam@handelsbanken.co.uk