Handelsbanken
Wealth & Asset Management

Client Director- South

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.

What is in it for you?

- We have a wide range of learning and development available, empowering and enabling our colleagues to take ownership of their own development.
- Competitive salary and an extensive range of benefits is provided, including private medical insurance, income protection and life assurance.
- A market-leading pension contribution of 15% paid by the bank, which can be invested in a wide range of funds (including ESG and Shariah funds).

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

Our Role

We are looking for a new Client Director to join our team in the South East. The ideal individual will be able to readily access London, Kent and Surrey.

The role of the Client Director is primarily to develop and manage relationships with Handelsbanken customers, focusing on the provision of financial advice and wealth management services. In addition, Client Directors routinely attract new clients to the group for both banking and wealth management services.

Main Responsibilities

- To build effective relationships across the Handelsbanken branch network to develop new business;
- To attract and develop new client relationships with wealth management and banking needs from outside of the group;
- To provide wealth management services to clients, with the support of a team of specialist tax, pension and investment management professionals within Handelsbanken Wealth Management. This will include:
    - Providing wealth planning input personally (both to new clients and to existing clients who opt for continuing advisory mandates);
    - Establishing and maintaining a detailed understanding of client risk attitude and capacity to enable advice to be given on the suitability of investment strategies.
    - Understanding the HWAM investment proposition and strategy characteristics to be able to explain and advise clients and prospective clients in this area.
    - Calling-in structuring specialists (the advice team is split between London and Tunbridge Wells, and covers tax, pension and inheritance planning) as required and co-ordinating the client interactions.
    - Cross-referring clients where appropriate to the Handelsbanken branches for banking services
- To develop and manage client relationships in an efficient, ethical and compliant manner which will lead to high levels of client satisfaction and enhance the reputation of Handelsbanken in the UK.

Person Specification

Academic:

- Successful candidates will have a strong academic background.
- Applicants must be professionally qualified (or nearly qualified) to QCF Level 4.

Experience:

The ideal individual will have many of the following attributes:

- Professional background gained in investment management, financial advisory, law, tax or private banking environments.
- Comprehensive experience in client development, gaining and managing complex HNW/UHNW clients who are prepared to give discretion over their investment management needs.
- Ability to add value to the client relationship through the delivery of holistic wealth planning advice - beyond investment in isolation.
- Strong networking skills and ability to build enduring relationships with colleagues, third party introducers and clients.
- Team player. Client Directors must work in partnership with Handelsbanken branch colleagues along with our technical specialists in the delivery of client services. The cultural imperative is to place the client's needs and welfare ahead of any more limited personal or business objectives.
- Applications are also welcomed from experienced financial services sector candidates whose next step would be a development CD role.

Contact

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