

Client Support Associate 12 Month Fixed Term Contract

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.

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

Salary & Benefits

- Competitive market rates
- Group personal pension scheme, private medical insurance, life insurance, income protection insurance, preferential staff rates, 25 days holiday, season ticket loan, long term profit sharing scheme

Our Role

We are recruiting for a Client Support Associate working within the Handelsbanken Wealth Management Team to provide first class support to customers. The Client Support team are the dedicated administration and adhoc advisory source for those on our Self Select and Asset Management only clients. This role will be based in our Tunbridge Wells office.

Main Responsibilities

Central Support

- Provide general administration and support to Private Clients engaged under either the Asset Management only and Self Select services.
- Administrative support to ACDs where required i.e. producing pre & post meeting documentation and other task as required
- Handling client telephone enquiries/requests from Handelsbanken Wealth & Asset Management switchboard.
- Respond to ad hoc requests as and when directed by line manager.
- Cover general office duties during holiday/sickness leave.

Specialist Team Work

- Dealing with applications received for Self-Select service and other cross business areas, following the procedures put in place from scanning, account set up, anti-money laundering checks.

- Acknowledgements to the clients, setting up website access and arranging for payments to be sent and subsequently invested.
- Provide basic technical advice to clients e.g. about how to navigate the website, log on, submit passwords, print out contract notes, access research/marketing material and, generally help the client to use the available online functionality.
- Undertake appropriate follow up action where straightforward which will include generating client letters, emails and dealing with phone calls promptly.
- Updating client records and liaising with the Operations Department regarding Data Amendments.
- Liaising with HbWM team, Handelsbanken branches and their customers.
- Providing formal advice on an adhoc fee basis, via the Client Support Teams dedicated Client Director, and implementation of any actions.

Academic:

- Progress towards a relevant regulated financial planning qualification (e.g. CII Diploma in Regulated Financial Planning) is preferred but not essential. The preferred candidate will have a desire to become Diploma qualified if they are not currently.
- Strong numeracy skills

Experience:

- Experience of providing customer service
- Experience within the wealth management/financial planning sector is desirable but not essential
- Confidence to liaise with staff and external parties at all levels

Person Specification

- Be business-orientated and focus on the client outcomes
- Strong written and verbal communication skills
- Self-confidence and self-motivation
- Good problem-solving and decision-making abilities
- Attention to detail and accuracy
- Time management
- Ability to maintain confidentiality
- Take responsibility for own development
- Have high ethical and moral standards
- Collaborate with others to achieve joint goals

Skills:

- Excel Skills – Intermediate
- Word Skills – Intermediate
- PowerPoint Skills – Intermediate

Contact

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