

## Protection Support Associate

### 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
- 4 x Death in service life cover
- Group Income Protection
- Discretionary Profit Sharing Plan

### Our Role

We are in the process of looking for a Protection Support Associate to join our Protection Team. This team has been up and running for a year and is still growing, so there are great opportunities for growth and to be involved in shaping the future of the Handelsbanken Wealth & Asset Management Protection proposition. This role can be based in our London, Tunbridge Wells or Manchester office.

The primary objective of this role is to support the Head of Protection & Protection Adviser with sales activities and the servicing of prospective clients. The successful candidate will receive full training and support from the Head of Protection. Training would involve a trip to the home base of the Protection team, which is in Tunbridge Wells, Kent.

The team are potentially expanding into the non-advised protection space, which means this role will straddle both journeys – advised and non-advised.

The advised world will involve you being the first point of contact for new client referrals, picking up the phone to introduce what we do to prospective clients and booking them in for meetings with our advisers. We operate on a referral system for existing branch customers, so we only reach out to customers who have agreed with their branch that they want to talk to us, so there will be no cold calling from us. It will be up to you to fill the advisers' diaries and remind clients they are meeting with us.

The non-advised world is likely to be fast paced, answering phones and emails quickly and efficiently from internal colleagues and clients alike. This will require knowledge of the protection offering and the ability to spot opportunities where a client may benefit from speaking to an adviser.

## Main Responsibilities

- Supporting Head of Protection and Protection Adviser with sales activities, through assistance with lead management
- Preparing new client documentation and ensuring compliant new client take on as well as managing the administration of existing clients
- Acting as the first point of contact for general client queries. Implementing actions and / or passing instructions to the appropriate team member
- Maintenance of client records
- Non-Advised: Speaking to clients, providing them with product information and quotes, whilst spotting opportunities where they may need to speak to an adviser.
- Liaising with the Wealth Advisers and Handelsbanken branches.

## Person Specification

As a growing business unit, it is important to us that you are an enterprising person and proactive. We want someone who is passionate and enjoys dealing with customers. We want someone who thrives in a busy environment, and can multi task and prioritise their work for the day.

Interpersonal skills:

- Ability to work in a fast paced, customer centric environment
- Strong verbal communication skills including experience of interacting with clients
- Excellent organisational skills
- Self-confident and motivated
- Good problem-solving and ability to take initiative
- Attention to detail and accuracy
- Time management
- Team player
- Ability to maintain confidentiality

Academic:

- Good secondary education, A level or equivalent
- Understanding of current Protection products in the market
- Financial Planning qualifications preferred, e.g. R05
- Relevant qualifications are desirable but not essential, support will be provided for candidates with potential that are seeking to become Level 4 qualified

## Contact

Please send your CV and covering letter to [careers.hwam@handelsbanken.co.uk](mailto:careers.hwam@handelsbanken.co.uk)