Handelsbanken

Wealth & Asset Management

Associate Client Director – Private Office Team Lead

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 is deeply committed to embedding good equality and diversity practice into all of our activities. This is so that we are an inclusive, welcoming and inspiring place to work that encourages everyone to apply, regardless of socio-economic background, age, disability, pregnancy and/or parental status, race (including colour, nationality, and ethnic or national origin), veteran status, marital and civil partnership status, religion or belief, sex, gender reassignment or sexual orientation.

At Handelsbanken, we deeply value our unique culture and values including trust in and respect for each individual. We take pride in nurturing a work environment where people flourish, and where they are empowered to take decisions in their areas of expertise. We take a long term perspective in everything we do and want each employee who joins us to build a long terms successful career with the Bank.

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 recruiting for an ACD Private Office Team Leader to join our Wealth Department and lead the Handelsbanken Wealth Associate Client Directors (ACDs) within the Private Office team, as well as providing excellent delivery of services to regulated advisers and their clients. This role can be based from our London or Tunbridge Wells office.

Main Responsibilities

- Managing team resources to meet daily needs of Client Directors and their clients in line with agreed processes and procedures to ensure consistent delivery of first-class client service.
- Identifying and supporting team member competency/training needs, through monthly 1-2-1 meetings and regular contact as required. Providing support and training to the team.
- Reporting to the Head of Wealth Support on any areas of staff competency, regulatory or work-practice concerns. Agree and implement appropriate actions to manage business risk.

- Contributing to the development of efficient and scalable solutions for the provision of wealth management services; seeking out errors, inefficiencies and cost savings potential.
- Preparing and chairing Private Office monthly team meetings and quarterly team days.
- Acting as Associate Client Director to provide support to one Client Director and where demand arises. Duties include:
    - Proactively arranging and assisting Client Director in the preparation of formal review and ad-hoc client meetings. Attending meetings with Client Director to take minutes and agree actions. Recording and maintaining client investment suitability records.
    - Acting as the first point of liaison for general client queries. Implementing actions or, in the case of advice or dealing requirements, passing instructions to the appropriate team member.
    - Monitoring progress and implementation of agreed client actions from meetings and other client contact; liaising with technical specialists, Investment Managers (or designated Associates) and Operations team.
    - Supporting Client Director with sales activities, through assistance with lead management, client events, presentation and other sales activity. Assisting with the drafting of service proposals and advice reports for the Client Director to review and progress.
    - Preparation and maintenance of bespoke reporting, gift schedules and ICE (in case of emergency) folders.
    - Maintenance of client records and activity workflows through CRM.

Person Specification

Experience:

- A good understanding of investment and financial planning principles and processes.
- Proven experience within the wealth management/financial planning sector.
- Confidence to liaise with clients, staff and external parties at all levels.
- Proven track record in providing outstanding customer service.
- Experience in people management and line management responsibilities.
- 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 literacy and numeracy skills.

Core Values:

- Attention to detail and accuracy
- Excellent written and verbal communication skills
- Self-confidence and self-motivation
- Good problem-solving and decision-making abilities
- Time management
- Strong team player
- Ability to maintain confidentiality

Contact

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