Handelsbanken
Wealth & Asset Management

Associate Client Director- 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 + Benefits

Our Role

We are recruiting for an Associate Client Director to join the Handelsbanken Wealth team to assist Client Directors with their Private Wealth Management client activities for high net worth clients with investment and wealth advisory needs. This role is based in our London or Tunbridge Wells office with the requirement for the successful candidate to travel to the other office on occasion.

Main Responsibilities

- Proactively arranging and assisting Client Directors in the preparation of formal review and ad-hoc client meetings. Attending a limited number of meetings with Client Directors to take minutes and agree actions. Recording and maintaining client investment suitability records.
- Acting as the first point of liaison for general client queries to understand their needs. 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 review meetings and other client contact; liaising with technical specialists, Investment Managers (or designated Associates), Operations team and third parties.
- Maintenance of client records and liaising with Operations regarding data amendments.
- Supporting Client Directors with sales activities, through assistance with lead management, client events, presentation and other sales activity. Assisting with the drafting of service proposals, route maps and advice suitability reports for the Client Director to review and progress.
- Maintaining good relationships and coordination, liaising with HWAM team, Handelsbanken branches and their customers.

- Dealing with any clients objections and complaints effectively, promptly and in accordance with regulatory requirements and Handelsbanken's processes, principles, culture and ethics.
- Ensuring data/instructions/monies are managed in an appropriate, accurate and timely manner.
- Ensuring AML guidelines are followed and evidence saved down correctly on clients files.
- Developing new client opportunities for Handelsbanken Wealth & Asset Management where a Private Wealth Management service is appropriate, introducing such new relationships to Handelsbanken where appropriate.

Person Specification

- Progress towards a relevant regulated financial planning qualification (e.g. CII Diploma in Regulated Financial Planning) is preferred but not essential.
- Strong numeracy skills
- Ability to work under pressure and meet tight deadlines

Experience:

- Thorough understanding of investment and financial planning principles, products and processes
- Proven experience within the wealth management sector is essential.
- Confidence to liaise with staff and external parties at all levels
- Experience of voyant / cashflow skills is desirable but not essential

Skills:

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

Interpersonal Skills:

- 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 and strong organisation
- Ability to maintain confidentiality

Contact

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