

## Wealth Management Information Associate

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 a MI Associate to join our Wealth Department and support the Head of Wealth Management. We are looking for someone with excellent organisational and business management skills as well as an interest in Wealth Management. This role can be based in our London or Manchester office.

### Main Responsibilities

- Provide business management support for the Handelsbanken Wealth Management Leadership team, overseeing all relevant activities effectively.

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No.1 Kingsway, London, WC2B 6AN

77 Mount Ephraim, Tunbridge Wells, Kent, TN4 8BS

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- Establish and maintain strong working relationships across the company and the Bank.

### **Management Information & Reporting:**

- Compile and collate management information (MI) from various sources.
- Present data in a structured and useful format (dashboards, charts, and summaries).
- Provide regular and ad hoc reports to key stakeholders.
- Maintain and improve reporting processes for efficiency.
- Ad-hoc departmental MI tasks, including assisting finance with Wealth requirements for external audit when needed.

### **Data Analysis & Reporting:**

- Collect, analyse, and interpret data to produce meaningful reports for management.
- Use **Excel (pivot tables, formulas, charts, and macros)** to process and present data effectively.
- Identify trends and insights to support business decision-making.
- Ensure accuracy and consistency of data within reports and databases.

### **Minute-Taking & Meeting Support:**

- To support at all internal Wealth Management meetings and committee meetings, to include but not limited to diary management, agenda setting, and the coordination of materials
- Attend meetings and accurately record minutes, capturing key points, actions, and decisions.
- Distribute minutes and follow up on action points with relevant stakeholders.
- Ensure meeting documentation is well-organized and accessible.
- Liaise with business departments (such as HR, Compliance, Finance) to ensure required obligations are fulfilled in a timely manner.
- Maintain oversight of Terms of Reference for Distribution Committee, ensuring they are reviewed regularly and updated as necessary.

### **Additional Tasks:**

- Support the Wealth leadership team with ad-hoc tasks, including carrying out provider Due Diligence and liaising with Business Support Governance upon completion.
- Liaise with the Communications team for any uploads or changes to be made on the adviser section of the Intranet.
- Ad-hoc coordination duties, for 3 regional teams and Leadership Team members..
- Organise regional and national team meetings as well as training events and business development conferences.
- Assist CDs and ACDs with regional Wealth Champion events.
- Co-ordinating and booking induction meetings for new members of the Wealth team.
- Cover where necessary for the CEO's EA when they are on annual leave.
- Co-ordination and event management for departmental events.

## **Person Specification**

### **Experience:**

- Proven experience within a similar role is advantageous but not essential.
- Advanced Excel skills (pivot tables, VLOOKUP, charts, automation, and data visualization).
- Experience in data analysis and management information reporting.
- Strong attention to detail and accuracy in handling data.
- Excellent administration and organisational skills.
- Ability to take clear, concise, and professional minutes.
- Strong communication skills to liaise with stakeholders at all levels.
- Ability to work independently and manage multiple priorities effectively.

**Core Values:**

- Is business-oriented and focuses on the customer.
- Takes a long-term approach.
- Has the courage to make decisions.
- Is innovative and proactive.
- Takes responsibility for their own development.
- Has high ethical and moral standards.
- Likes good administrative order.
- Collaborates with others to achieve joint goals.
- Contributes to the development of operations and colleagues.

**Contact**

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