

Protection 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 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 Protection Associates help the Protection Advisers with all aspects of providing suitable advice to our high net worth clients. This includes joining meetings with clients, remotely, where necessary, taking notes and drafting the advice as directed by the Adviser. You will also be building a relationship with our clients and keeping in regular contact with them, to follow up on actions or to answer their queries. You will manage the application process and ensure our clients are always kept up to date with how their application is progressing.

The team are potentially expanding into the non-advised protection space, which means this role may straddle both journeys – advised and non-advised. Your primary responsibility will lie alongside the advisers and clients who require advice, however, you may also be on the phone speaking to clients about protection products in a non-advised manner and setting up their policies.

Main Responsibilities

- Work alongside Advisers to deliver a highly personalised holistic protection service, focused on improving all client outcomes and ensuring client needs are met.
- Supporting Protection Advisers with sales activities, through assistance with lead management, client events, presentation and other sales activity.
- Assisting with the drafting of advice suitability reports for the Protection Adviser to review and progress.
- Proactively arranging and assisting Protection Advisers in the preparation of client meetings. Attending a limited number of client meetings to take minutes and agree actions.
- Liaise with product providers, Wealth Advisers, Handelsbanken branches and other third parties.
- Acting as the first point of contact for general client queries as well as developing a relationship with those clients.
- Preparing new client documentation and ensuring compliant new client take on as well as managing the administration of existing clients
- Implementing actions and / or passing instructions to the appropriate team member
- Contribute to the ongoing development of best practice within the business.

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.

Experience:

- Experience of proactively interacting with clients
- Understanding and previous experience of current Protection products in the market, including corporate protection
- Experience of drafting advice reports is desirable

Interpersonal skills:

- Strong written and verbal communication skills
- 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 i.e. preferably, primarily As and Bs at A level or equivalent
- Financial Planning qualification RO5 required
- Additional Financial Planning qualifications RO1 & RO4 preferred
- Additional 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