Handelsbanken
Wealth & Asset Management

Client Director

About Us

Founded in Sweden, Handelsbanken has become one of the world's strongest banks, with a culture focused on client satisfaction. The bank offers local relationship banking, advice and investment management to personal and corporate customers through its network of around 200 UK branches.

Handelsbanken Wealth and 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. Our role is to provide wealth management services – the combination of rigorous, disciplined investment management and holistic tax, pension and retirement planning - to Handelsbanken customers across the country.

Our success is evidenced by the significant organic growth achieved in recent years; we now have more than £4.3 billion of client funds under management and administration as at 31 May 2021. For over 25 years we have been serving a diverse cross-section of investors, including; FTSE 100 directors, entrepreneurs, charities, pension funds, private equity partners and hedge fund managers.

This is an opportunity to join growing organisation that is part of an internationally respected and financially strong institution.

Handelsbanken Group are deeply committed to embedding enlightened equality and diversity practice into all of our activities so that we can all enjoy 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.

We encourage and welcome applications from across the global community and all appointments are made solely on merit.

If you would like to find out what it is like working at Handelsbanken Wealth Management please follow the link below:
http://www.handelsbankenwealth.co.uk/about-us/how-we-work-with-you/

Salary & Benefits

- Competitive market rates
- Group personal pension scheme, private medical insurance, life assurance, income protection insurance, minimum of 25 days holiday, season ticket loan

The Role

We are looking for a new Client Director to join our team in the South East. The ideal individual will be able to readily access London, Kent and Surrey.

The role of the Client Director is primarily to develop and manage relationships with Handelsbanken customers, focusing on the provision of financial advice and wealth management services. In addition, Client Directors routinely attract new clients to the group for both banking and wealth management services.

Main Responsibilities

- To build effective relationships across the Handelsbanken branch network to develop new business;
- To attract and develop new client relationships with wealth management and banking needs from outside of the group;
- To provide wealth management services to clients, with the support of a team of specialist tax, pension and investment management professionals within Handelsbanken Wealth Management. This will include:

- Providing wealth planning input personally (both to new clients and to existing clients who opt for continuing advisory mandates);
    - Establishing and maintaining a detailed understanding of client risk attitude and capacity to enable advice to be given on the suitability of investment strategies.
    - Understanding the HWAM investment proposition and strategy characteristics to be able to explain and advise clients and prospective clients in this area.
    - Calling-in structuring specialists (the advice team is split between London and Tunbridge Wells, and covers tax, pension and inheritance planning) as required and co-ordinating the client interactions.
    - Cross-referring clients where appropriate to the Handelsbanken branches for banking services
- To develop and manage client relationships in an efficient, ethical and compliant manner which will lead to high levels of client satisfaction and enhance the reputation of Handelsbanken in the UK.

Person Specification

Academic:

- Successful candidates will have a strong academic background.
- Applicants must be professionally qualified to ideally QCF Level 6 and hold a valid Statement of Professional Standing (SPS).

Experience:

The ideal individual will have many of the following attributes:

- Professional background gained in investment management, financial advisory, law, tax or private banking environments.
- Comprehensive experience in client development, gaining and managing complex HNW/UHNW clients who are prepared to give discretion over their investment management needs.
- Ability to add value to the client relationship through the delivery of holistic wealth planning advice - beyond investment in isolation.
- Strong networking skills and ability to build enduring relationships with colleagues, third party introducers and clients.
- Team player. Client Directors must work in partnership with Handelsbanken branch colleagues along with our technical specialists in the delivery of client services. The cultural imperative is to place the client’s needs and welfare ahead of any more limited personal or business objectives.

Contact

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