Client Support Associate- 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.

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 Client Support Associate working within the Operations Client Support Team to provide first class support to customers. The Client Support team are the dedicated administration and adhoc advisory source for our Self Select and Asset Management only clients. This role will be based in our Tunbridge Wells office.

Main Responsibilities

Central Support

- Provide general administration and support to Private Clients engaged under either the Asset Management only and Self Select services.
- Administrative support to Associate Client Directors (ACDs) where required i.e. producing pre & post meeting documentation and other task as required
- Handling client telephone enquiries/requests from Handelsbanken Wealth & Asset Management switchboard.
- Respond to ad hoc requests as and when directed by line manager.
- Cover general office duties during holiday/sickness leave.

Specialist Team Work

- Dealing with applications received for Self Select service and other cross business areas, following the procedures put in place from scanning, account set up, anti-money laundering checks.
- Acknowledgements to the clients, setting up website access and arranging for payments to be sent and subsequently invested.
- Provide basic technical support to clients e.g. about how to navigate the website, log on, submit passwords, print out contract notes, access research/marketing material and, generally help the client to use the available online functionality.
- Undertake appropriate follow up action where straightforward which will include generating client letters, emails and dealing with phone calls promptly.
- Updating client records and liaising with the Operations Department regarding Data Amendments.
- Liaising with Wealth Management team, Handelsbanken branches and their customers.
- Supporting the provision of formal advice, via an adviser from the Wealth Management team, to clients within the Wealth Support team on an adhoc fee basis, and implementation of any actions.

Academic:

- University degree preferred, but not essential

Experience:

- Experience of providing customer service
- Experience within the wealth management/financial planning sector is desirable but not essential
- Confidence to liaise with staff and external parties at all levels

Person Specification

- Is business-oriented and focussed on the customer.
- Takes a long-term approach.
- Has the courage to make decisions and question existing procedures.
- Is innovative, proactive with a positive mental attitude.
- Takes responsibility for his/her own development and actions.
- Complete the required annual e-learning in a timely manner and additional learning as you feel appropriate to the role.
- Has high ethical and moral standards.
- Maintenance of good administrative order.
- The ability to manage workflow and tasks effectively.
- Collaborates with others to achieve joint goals towards the business plan
  - Within the team
  - Within the Operations Department
  - Within the business
- Contributes to the development of operations and colleagues.

Skills:

- Strong numeracy skills
- Good communication skills and telephone manner
- Excellent attention to detail
- Excel Skills – Intermediate
- Word Skills – Intermediate
- PowerPoint Skills – Intermediate

Contact

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