

Handelsbanken

Wealth & Asset Management

Wealth Planner – Team Leader

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 looking to appoint a Wealth Planner – Team Leader to lead a team of Wealth Planners providing technical financial planning advice.

Main Responsibilities

- Management of HMRC regulated pensions, Discounted Gift and Loan & Gift Trusts, and replacement business activities that should fully meet prevailing regulatory requirements.
- Support the Handelsbanken Wealth leadership team to identify, agree and implement the policies and business strategy required to deliver the company's objectives as set out in the Business Plan.
- Act as a subject matter expert and with the support of other Wealth Planners take the lead in the development and managing of specialist wealth advisory content, to be delivered by Client Directors, either alone or with the support of Wealth Planners.
- Work with the Business Control Manager in the continued development of a consistent delivery of integrated investment and wealth advice, together with annual Private Wealth Management reporting.
- Work with the Distribution Committee to :-
 - Maintain a framework and methodology for implementation and use of a panel for products advised on by the business (personal pensions, offshore investment bonds etc.).
 - Assist with the initial and regular due diligence on HWAM's recommended advice product providers e.g. the introduction of new products and product wrappers, HWAM's recommended SIPPs and OIB providers.
 - Monitor legislative, regulatory and market changes that may impact advice given to clients.

- Lead and support the team of Wealth Planners as well as supporting the ACDs and CDs through technical training, participation in client meetings and proactive team development initiatives. Promote efficient team working to meet the common goals and needs of wealth management clients.

Person Specification

- University graduate or equivalent combination of education/ experience
- Level 6 qualified – Chartered Financial Planner with Pension Transfer Specialist permissions
- Very strong understanding of financial planning principles
- Genuine desire to provide an exceptional standard of advice and service to clients
- Strong written and verbal communication
- High attention to detail
- Hold SPS status
- Detailed knowledge of defined contributions pensions (including safeguarded benefits) is an advantage
- Knowledge of defined benefit pension transfers is advantageous but not essential
- Experience of using FE analytics, Assureweb, Voyant and Selectapension is advantageous but not essential
- Proven experience dealing with high net worth private clients

Skills:

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

Contact

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