

About us

Heartwood Wealth Management Ltd is the investment and wealth management business of Handelsbanken in the UK, the Swedish bank that has been growing its local branch network rapidly in the UK. Our external facing brands are now: Heartwood Investment Management and Handelsbanken Wealth Management.

For more than 25 years, Heartwood has been trusted by customers, including many business leaders and sophisticated financial professionals, to manage their wealth prudently and in line with their individual requirements. We have maintained our customer-led ethos throughout, and evolved into a company known as much today for the multi-asset-class investment skills as for our high quality wealth management services. Total AUMA are currently £2.8 billion (as at September 2016) and our clients range from city professionals and private individuals to trusts, charities and Financial Planner firms - the latter supported through a dedicated intermediary team.

In 2013, Heartwood became part of Handelsbanken, a natural merger given both companies' primary focus on customer service and satisfaction. Having developed a substantial British branch network based on the warm reception for its local, highly personalised banking services, the relationship bank was keen to meet growing customer demand for wealth management services.

This is an opportunity to join a successful and fast-growing national organisation with the added benefit of being part of a significant international presence through the Handelsbanken Group. Heartwood continues to invest in broadening and improving the range of services provided to its clients, which today includes many customers of Handelsbanken.

At Heartwood, we are deeply committed to embedding good equality and diversity practice into all of our activities so that Heartwood is an inclusive, welcoming and inspiring place to work, regardless of age, disability, gender reassignment, marital status, pregnancy and maternity, race, religion, sex or sexual orientation.

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

Salary & benefits

- Competitive market rates
- Group Personal Pension Scheme, Private Medical Insurance, Life Insurance, Income Protection Insurance, preferential staff rates, minimum of 25 days holiday, Season Ticket Loan

Our role

We are recruiting for a Intermediaries Support Team Leader to join our team in London. The primary objective of this role at this time is to assist the Professional Intermediary (PI) Client Directors as well as line managing the support team itself. This team services the growing number of Independent Financial Advisor/Wealth Management firms (Partner Firms) who invest in Heartwood's funds.

Reporting to the Head of Third Party Distribution, in time, as we look to expand our offering to other Third parties, the role may evolve into a wider Head of Support functions as we look to build a scalable operation to service other third party channels.

Main responsibilities

PI Team support and Support Team management

- Act as line manager for the London based Professional Intermediary support team (currently two staff)
- Lead the team to ensure that the PI Client Directors are well supported in developing new Partner Firm relationships and serving existing Partner Firms effectively, in particular ensuring that an excellent level of service is maintained and any problems are quickly identified and addressed

- Support the Head of Intermediary Sales in their day to day activities
- Support the PI Client Directors with sales activities, through assistance with lead management, client events, presentations/pitches and other sales activities
- With guidance from the Head of Intermediary Sales, assist in the development of the Professional Intermediary support team into potential “account managers” for Partner Firms

Governance and Best Practice

- Ensure on going strong Governance and Compliance practices are maintained and developed with clear, robust, efficient processes

Product

- Work with the Product Office in managing the operational process for funds linked to external platforms, life companies, ratings agencies and data vendors.

Client Management

- Oversee the client management process, including maintaining client records and liaising with operations regarding data amendments where necessary
- Manage CRM and the prospecting database
- Act as a supporting point of contact for Partner Firms for general queries
- Prepare new client documentation and ensure compliant new client take on. Manage administration of client requirements, payments and selling of funds
- Monitor progress and implement agreed client actions from review meetings and other client contact; liaise as appropriate with technical specialists, Investment Managers (or designated Associates) and Operations team
- Liaise with the greater Heartwood team, Handelsbanken branches and their customers

Person specification

Interpersonal skills:

- Strong written and verbal communication skills
- Self-confidence and motivated
- Willingness to work hard
- Good problem-solving and decision-making abilities
- 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
- University education, or equivalent, desirable
- Investment or Financial Planning qualifications preferred
- Broad Understanding of Investments
- Relevant qualifications are desirable but not essential, support will be provided for candidates with potential that are seeking to become Level 4 qualified

Experience:

- Knowledge of regulatory process and requirements
- Previously held a role within Investment Management, Insurance or Financial Advisory in an Intermediary capacity
- Line management experience/capability
- Proven experience within the wealth management sector
- Ability to assess risk to the business and to escalate where required
- Confidence to liaise with internal stakeholders and staff in addition to external parties

Contact

Please send your CV and cover letter to careers@heartwoodgroup.co.uk. For any further questions please contact 020 7045 2606.