

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 £2.9 billion (as at 31 December 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, 25 days holiday, season ticket loan, long term profit sharing scheme

Our role

- We are in the process of looking for an Intermediaries Support Associate to join our Professional Intermediary team in London. The primary objective of this role is to assist the Head of Intermediary Sales & Intermediary Client Directors. The Professional Intermediary team provides support to the Independent Financial Advisors who invest in Heartwood's multi asset funds.

Main responsibilities

- Supporting Intermediary Client Directors with sales activities, through assistance with lead management, client events, presentation and other sales activity.
- Acting as the first point of liaison for intermediaries for general client queries. Implementing actions and / or passing instructions to the appropriate team member.
- PA responsibilities to the Head of Intermediary Sales
- Monitoring progress and implementation of agreed actions from internal meetings.
- Preparing new client documentation and ensuring compliant new client take on. Managing administration of client requirements, payments and selling funds
- Maintaining client records and liaising with operations regarding data amendments.

- Liaising with technical specialists, Investment Managers (or designated Associates) and Operations team.
- Liaising with the Marketing team to oversee production of collateral and ensure services are provided in a compliant manner
- Liaising with the Heartwood team and Handelsbanken branches.

Person specification

The successful applicant will have an interest in working with independent financial advisers and knowledge of multi asset investing. You will also have skills of building rapport and relationships in an at times, high paced environment. The area of work involves accuracy, integrity and independence as well as the ability to work well within a team environment.

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
- 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 2599