



Heartwood

Part of the Handelsbanken Group

Investment Associate

About us

Heartwood Investment Management ('Heartwood') is a multi-award winning, boutique investment manager. We aim to preserve and build the value of client assets by investing with an institutional approach and a high level of personal service. Heartwood manages portfolios for private clients through Handelsbanken Wealth Management and offers its investment management services directly to charities, individuals through professional intermediaries, and institutions. Our business is focused entirely on global multi asset class investing, which allows us complete flexibility to choose what we consider to be the best investment solution at any given time. Our success is evident from the significant organic growth achieved in recent years, and we now have more than £2.9 billion of client funds under management and administration ('AUMA') as at 31 December 2016. For over 25 years we have been trusted by discerning and knowledgeable investors such as FTSE 100 directors, leading UK charities, pension funds, private equity partners and hedge fund managers.

Heartwood originated in 1988 as a financial services business offering both wealth and investment management and since May 2013 Heartwood Investment Management has been owned by the Swedish bank Handelsbanken. Founded in Sweden in 1871, Handelsbanken has become one of the world's strongest banks with over 800 branches in 20 countries worldwide, offering local relationship banking with products and services tailored to the needs of personal and business banking customers. Established in the UK since 1982, the bank has a decentralised network of over 205 branches throughout Britain. The fifth-highest-rated bank in Europe and one of the top twenty strongest banks in the world (as ranked by Bloomberg, June 2015). Handelsbanken was recently ranked top for customer satisfaction and loyalty, for the eighth year running, in an independent survey of UK bank customers (EPSI Rating UK 2016).

Heartwood is offering an opportunity to join a successful and fast-growing Investment Management 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 Investment Associate to join Heartwood Investment Management in London. The primary objective of this role is to assist in the Management of Heartwood Alternatives Investments, which includes the Heartwood Alternatives fund.

Main responsibilities

Business Management

- Actively participate in the smooth operation of Heartwood Investment Management.

Research & Fund Management

- Conduct research into specific areas within the alternatives investment universe and contribute to the development of strategic views on different alternative sub-asset classes.
- Conduct manager due diligence and selection within the alternative investment universe for Heartwood portfolios by identifying attractive manager strategies, developing industry sourcing networks and conducting in-depth investment diligence on selected managers.
- Assist in the portfolio management process for the Heartwood Alternatives Fund, ensuring that the fund is managed in accordance with Heartwood procedures and investment decisions.
- Assist in the monitoring of Heartwood's alternative investments, including conducting manager updates, reviewing underlying portfolio information and monitoring necessary risk metrics.

Risk Management

- Follow Heartwood Investment Management investment processes and comply with Heartwood and FCA regulatory guidelines.
- Help to support the investment risk management function for broader Heartwood multi-asset portfolios when required.

Distribution

- Assist in the production of new business presentations and support business development professionals in winning new business.

Person specification

The successful applicant will have an interest in working with the alternatives industry and knowledge of multi asset investing. You will have the ability to build rapport and working relationships easily in an ambitious and fast paced environment. The role requires 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 motivation
- 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 and University education
- Investment management qualification desirable; IMC, CFA

Experience:

- Proven experience in capital markets, research, investment management or alternative investments is desirable

Contact

Please send your CV and cover letter to careers@heartwoodgroup.co.uk. For any further questions please contact 020 7045 2599