



### 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 £3.1 billion of client funds under management and administration ('AUMA') as at 31 March 2017. 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. 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, pregnancy and/or parental status, ethnicity, religion, sex, gender reassignment or sexual orientation. We encourage and welcome applications from across the global community and all appointments are made solely on merit.

### Salary and 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 recruiting for a Client Reporting Associate to join our newly created Client Reporting team based in London. This exciting new entry level position is to assist in a project to implement Sim Corp investment reporting software to deliver innovative print and digital reporting. In this role we are looking to train someone in the system as part of the project team, with a view to a permanent contract when the system goes live later in the year. Thereafter, the Client Reporting team will be responsible for the ongoing improvement of the market leading software to create automated and advanced reporting digitally and on paper for our clients. A creative mix of marketing and IT skills would be preferable to help the team build new reporting capabilities.

### Looking for someone that can:

- Assist the Client Reporting Manager to deliver sophisticated print and digital reporting to a broad client base
- Bring energy to the newly created team
- Work in a collaborative way to build and improve reporting capabilities
- Engage with the external supplier efficiently and productively, learning new skills and techniques
- Proactively plan and with excellent time management skills
- Build rapport with the wider organisation to help solve problems and retrieve feedback on the reporting outputs.

### Skills and experience

This role does not require any background in Investment Management or investment reporting as we will provide training. However we do require the following aptitudes and a willingness to learn:

- Good problem-solving and decision-making abilities
- Strong communication skills to liaise with internal and external stakeholders.
- Interest in web-design and can think of creative ways to display information
- Strong IT skills
- Strong attention to detail
- Self-confidence and self-motivated.

### Academic:

- Good secondary education at A level and University education.

Please send your CV and covering letter to [careers@heartwoodgroup.co.uk](mailto:careers@heartwoodgroup.co.uk).