

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 £3.1 billion (as at 31 March 2017) 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.

The Handelsbanken Group 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 in the process of looking for an Operations Administrator to join our professional Operations department in Tunbridge Wells. The purpose of this role is to support the Data Management team with important Data maintenance functions. These duties include: the maintenance of data across all Heartwood systems; setting up clients on Heartwood's Settlement system; and ISA administration. The Data Management team supports the client-facing teams in the servicing our clients. Heartwood's Data Management team consists of a team of 6.

Main responsibilities

- Maintain and update client and stock data on all Heartwood systems
- Set up new client accounts
- Set up new stocks
- Maintain and update prices and yields for manually priced stocks
- Create and maintain other static data held on Heartwood Systems
- Process ISA subscriptions requests

Person specification

The successful applicant will have an interest in Operations and an eye for detail. 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.

Academic:

- Good secondary education to A level

Experience

- Proven experience in an office environment is desirable, preferably financial or professional service

Skills:

- System experience: Microsoft CRM, Sage CoreTime, Dion/Investmaster/Settlement - *preferred but not essential*
- Good Microsoft skills – Excel, Word, PowerPoint, Outlook

Interpersonal Skills:

- Strong written and verbal communication skills
- Self-confidence and self-motivation
- Willingness to work hard
- Good problem-solving and decision-making abilities
- Attention to detail and accuracy
- Time management
- Ability to maintain confidentiality
- Team Player

Contact

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