

About us

Heartwood is a wholly owned subsidiary of the Handelsbanken Group and is responsible for all wealth and investment management activities of the Group in the UK. Handelsbanken offers local relationship banking, advice and investment management (provided by Heartwood Investment Management) to personal and corporate customers through its fast-growing network of over 200 branches across the UK. Our success is evident from the significant organic growth achieved in recent years, and we now have more than £3.3 billion of client funds under management and administration ('AUMA') as at 30 September 2017. For over 25 years we have been trusted by investors such as FTSE 100 directors, entrepreneurs, leading UK charities, pension funds, private equity partners and hedge fund managers.

Founded in Sweden, Handelsbanken has become one of the world's strongest banks, with a culture focused on client satisfaction.

This is an opportunity to join a successful and fast-growing national organisation with the added benefit of being part of a significant multinational group.

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 & 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 Client Director to join our professional Intermediaries team in Scotland. This individual will have the credibility and experience to engage with both business owners and advisers of target firms.

Main responsibilities

- In conjunction with the existing Client Directors and the Head of Third Party Distribution develop Heartwood's proposition to Independent Financial Advisers (IFAs).
- Build and maintain relationships with a network of IFAs through existing personal contacts and the development of new contacts/relationships.
- Market and promote Heartwood's investment management capability/investment solutions to IFAs.
- Win business mandates via IFAs including the introduction of new discretionary investment clients to Heartwood.
- Ensure appropriate and agreed service levels for IFAs and their clients are being met across the Company.
- Assist other colleagues within the Company to develop new business or maintain existing relationships, where appropriate.
- Gain a thorough understanding of the Company's products and services and the circumstances in which they may be appropriate for existing and potential clients.

- Work closely with the Handelsbanken branches and their network of IFA's within their local territory.
- Work with the Client Services & Investment Divisions to continuously improve and develop the Heartwood proposition for IFAs, including Heartwood's presence on platforms.
- Comply at all times with Heartwood's Risk & Compliance procedures and framework, including those relating to Treating Customers Fairly.

Person specification

The successful applicant will have an interest in working with Independent Financial Advisers and a knowledge of multi asset investing. You will also have skills of building rapport and relationships in a high paced environment.

Interpersonal skills:

- Strong written and verbal communication skills
- Self-confidence and self-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
- Demonstrate the Heartwood and Handelsbanken Culture

Academic:

- Broad Understanding of Investments
- University education, or equivalent, desirable
- Investment or Financial Planning qualifications preferred
- Relevant qualifications are desirable but not essential

Experience:

- Previously held a role within Investment Management, Insurance or Financial Advisory in an Intermediary capacity
- 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 2599