

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, wealth management advice, (provided by Handelsbanken Wealth Management) 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 £3.4 billion of client funds under management and administration ('AUMA') as at 31 December 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.

The Handelsbanken Group is 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 six people.

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 a high paced environment. The area of work involves accuracy, integrity and independence as well as the ability to work well within a team.

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.