



Heartwood

Part of the Handelsbanken Group

Summer Internship 2018

About us

Heartwood 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.

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 within our Heartwood Investment Management business as for our high quality wealth management services. Total AUMA are currently £3.4 billion (as at December 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 include 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, 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.

Our role

This is an exciting opportunity to join one of our departments based in London and Tunbridge Wells for a paid six weeks summer internship starting in July.

You will be part of a Heartwood team assisting them with their day-to-day duties and ad hoc projects as well as conducting your own research project which will provide you with a multifaceted insight of the wealth management industry.

To provide you with a better understanding of our Heartwood teams, please have a read below!

- *Private Wealth Management* (Tunbridge Wells / London)
Heartwood's private client's team provides high quality advice to clients including business owners, private equity partners, leading investment bankers and FTSE 100 CEOs and CFOs with regards to investments, tax planning and advice, and retirement and inheritance planning.
- *Investment Management Communications* (London)
The Heartwood Investment Communications works closely with the investment team to manage the investment writing and maintenance of marketing literature and web pages, working with key distribution channels (IFA, Private Client and Professional Adviser) to create and deliver appropriate marketing campaign material whilst supporting the team with a range of administrative tasks.

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77 Mount Ephraim, Tunbridge Wells, Kent TN4 8BS. Tel: 01892 701801

heartwoodgroup.co.uk

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Heartwood is a trading name of Heartwood Wealth Management Ltd which is authorised and regulated by the Financial Conduct Authority in the conduct of investment business, and is a wholly-owned subsidiary of Svenska Handelsbanken AB (publ). Registered Head Office: London address above.

Registered in England Number: 4132340.

- *Advice* (Tunbridge Wells)
The tax team works closely with the private client team to ensure that the client's wealth is managed in the most tax-efficient way possible, from accumulation through to retirement and ultimately, tax-efficient succession planning. A second team of specialists supports the private client advisors in all aspects around advice and service relating to pensions.
- *Operations* (Tunbridge Wells)
The Heartwood Operations team is a key business support function that provides operational administration support to the private client and investment divisions dealing with client documentation, stock reconciliations and client money procedures.

Person specification

Academic:

- Good secondary education i.e. primarily As and Bs at A level or equivalent

Interpersonal Skills:

- Strong written and verbal communication skills
- Self-confidence and self-motivation
- Problem-solving and decision-making abilities
- Attention to detail and accuracy
- Time management
- Ability to maintain confidentiality

Contact

Please send your CV and cover letter to careers@heartwoodgroup.co.uk with a clear indication of the business area(s) that you would like to be considered for. When applying, please also ensure that you are available for the full period of six weeks starting on the 9th July 2018.