

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 £3.7 billion (as at 30th September 2018) 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.

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, gender reassignment, marital status, pregnancy and maternity, race, religion, sex 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 looking for an Investment Risk Analyst to join the Heartwood Risk team in London. This role sits in the Risk team at Heartwood and is therefore a second line of defence risk role. Reporting to the Head of Risk, the role requires the Investment Risk Analyst to adapt and enhance the investment risk management framework and processes. It involves regular interaction with the other teams such as Compliance, Data and the Investment teams.

Main responsibilities

- Independently perform risk analysis with performance review on funds and Segregated accounts. Providing management with fund risk & performance information.
- Liaise with Heartwood data team to ensure risk data integrity.
- Perform risk calculation and analysis using Factset and other tools.
- Monitor risk metrics such as concentration, liquidity, portfolio turnover.
- Perform stress test calculation and scenario analysis.
- Analysis and Interpretation of Risk and Performance figures relative to risk factors, benchmarks and peer groups including derivative positions using a variety of metrics & measures.

- Monitor and report on all portfolio and segregated accounts risk as well as settlement counterparty risk exposure with appropriate escalation as necessary.
- Develop and maintain Investment Risk Management Policies and Procedures.
- Produce accurate risk reports on required frequency (e.g. Daily, Weekly, Monthly and Quarterly).
- Contribute to ad hoc project or other assignments.
- Understand the UK Regulatory landscape and improve knowledge on Alternative Investment Fund Managers Directive (AIFMD).

Person specification

- Approximately 2 years' experience in an Investment Risk / Performance Analysis role.
- Strong academic record in a quantitative field.
- Strong Excel and VBA skills.
- Knowledge of financial market and asset classes. Preferably an understanding of multi-asset investment.
- Experience of using Risk tools such as Factset, Bloomberg PORT.
- Strong attention to detail.
- Analytical thinking and problem solving ability.
- Excellent communication and interpersonal skills.
- Self Starter.

Qualification

- Bachelor's degree in a quantitative field
- Relevant advanced degree would be favourable
- Industry qualification such as Financial Risk Manager (FRM) or Professional Risk Manager (PRM) or a desire to study would be advantageous

Contact

Please send your CV and cover letter to careers@heartwoodgroup.co.uk. For any further questions please contact 020 7045 1381