



Heartwood

Part of the Handelsbanken Group

Management Information Analyst (FTC)

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 £4.0 billion (as at 31 December 2019) 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.

Our role

We are looking for a Management Information Analyst to join the Heartwood Finance team in London. The primary objective of this role is to support the business with accurate financial information.

Main responsibilities

- Provide financial information and analysis to management and the wider business.
- Calculation, analysis and presentation of key company metrics such as the AUMA (Assets under Management & Administration), new business flows, client numbers, revenue growth, cost control, the business development profit sharing model, internal team P & Ls and regulatory KPIs.
- Responsible for detailed analysis on performance and trends for both Handelsbanken Wealth Management & Professional Intermediary sales teams.
- Assisting with business planning/modelling and ICAAP computations.
- Responsibility for data standards, reconciling, monitoring, and status reporting as far as they relate to the provision of accurate management information.
- Responsible for documentation of all processes (both new and existing).
- Work with key individuals in ensuring that reporting requirements are met.
- Provide ad-hoc research and statistical reports as required.
- Assisting with on-going streamlining projects within the department.

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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.

Person specification

You will have the ability to build rapport and working relationships easily in an ambitious and fast paced environment. The role requires accuracy, integrity, independence of thought as well as the ability to work well within a team environment.

- Highly analytical
- High accuracy levels
- At least 3 years' experience working with MI
- Be business-orientated and focus on the client
- Have good administrative order including adherence to all risk and compliance policies
- Take a long-term approach
- Have the courage to make decisions
- Be innovative and proactive
- Take responsibility for own development
- Have high ethical and moral standards
- Collaborate with others to achieve joint goals
- Contribute to the development of operations and colleagues
- Take leadership of own performance

Academic:

- Good secondary and University education
- CIMA or ACCA full or part qualified

Contact

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