ROTHSCHILD

Role Profile

Level Associate
Division UK Wealth Management

Introduction to Rothschild and Wealth Management

Rothschild is the world's largest independent international merchant and investment bank employing more than 2,800 people across 40 countries. Today our firm has 4 primary businesses:
Global Financial Advisory; Merchant Banking; Asset Management; and Wealth Management & Trust.

As a family controlled firm with more than 200 years of history, Wealth Management & Trust is uniquely placed to advise the world's most successful individuals, wealthiest families and pre-eminent charities on their structuring and investment needs.

Wealth Management has enjoyed considerable growth in recent years, reflecting client desire for unconflicted advice, excellent investment results and the quality of our employees.

Role Background

Great Wealth Managers must provide a first class personal service, where team members truly know each client and understand their requirements, whilst also delivering on each client's investment requirements. To achieve this, we adopt a collaborative approach, splitting relationship and portfolio responsibilities between Client Adviser and Portfolio Manager teams.

Client Adviser teams are responsible for all elements of a client's relationship with Rothschild. This includes: working with clients to determine their investment requirements, co-ordinating investment advice and handling all day-to-day client needs. Teams are comprised of senior Client Advisers, Analysts and Associates, who support Client Advisers, and Administrators.

We are seeking to hire an exceptional Associate to join one of our London based Client Adviser teams to help look after clients and grow the book of business.

Person Profile

- Directly relevant experience
- Highly numerate with good analytical ability
- Excellent written English and highly articulate
- Excellent inter-personal and relationship skills – demonstrates to the potential to be able to "take control" of client meetings and the gravitas to guide clients.
- A self-starter / entrepreneurial character who is keen to develop and explore new business opportunities.
- Strong organisational skills, ability to multi-task and maintain exceptional attention to detail even when working under pressure
- Can-do attitude, approach all tasks with energy and enthusiasm.
- Collaborative team player
- The highest levels of professional and personal integrity.
- Curious and ambitious
- Strong IT skills to include advanced PowerPoint, Word and Excel
- Knowledge and interest in financial markets and investments
- PCIAM / other Technical qualification preferred (level 6). At minimum level 4 qualification is required.

Specific Responsibilities

- Take ownership of some client relationships (with guidance).
- Demonstrate an ability to build an external network and generate new business opportunities.
- Production of portfolio reviews, investment proposals and other communications for clients / potential clients.
- Preparation of bespoke analysis for specific client situations.
- Pro-active monitoring and review of client portfolios, including: consideration of risk tolerance, tax, appropriateness of positions, missing opportunities, etc.
- Liaising with the investment team regarding investment recommendations and implementation.
- Creation and maintenance of opportunity (new clients) and watch lists (investments).
- Co-ordination of new account openings – working with client advisers, administrators and compliance.
- Collating data and information for senior team members on markets and portfolios.