https://www.execcapital.co.uk/job/senior-wealth-manager/

# Senior Wealth Manager

**Description**
**ob Title:** Senior Wealth Manager
**Location:** London, United Kingdom
**Department:** Wealth Management
**Reports to:** Head of Wealth Management / Managing Director

## Job Summary:

The Senior Wealth Manager will be responsible for providing tailored financial advice and wealth management services to high-net-worth individuals (HNWIs) and ultra-high-net-worth individuals (UHNWIs). This role involves managing and growing a portfolio of clients by delivering comprehensive financial planning, investment strategies, and wealth preservation solutions. The Senior Wealth Manager will work closely with clients to understand their financial goals and develop strategies that align with their long-term objectives, ensuring a high level of client satisfaction and retention.

**Responsibilities**

## Key Responsibilities:

- **Client Relationship Management:**
  - Build and maintain strong, long-term relationships with HNW and UHNW clients, understanding their unique financial needs and objectives.
  - Provide personalized financial advice and solutions, including investment management, retirement planning, tax planning, estate planning, and risk management.
  - Conduct regular reviews with clients to assess their financial plans and adjust strategies in response to changes in financial markets or personal circumstances.
- **Portfolio Management:**
  - Manage a portfolio of clients, ensuring their investments align with their risk tolerance, financial goals, and market conditions.
  - Develop and implement investment strategies tailored to individual client profiles, using a wide range of financial products including equities, bonds, mutual funds, and alternative investments.
  - Monitor and report on portfolio performance, making recommendations for rebalancing or reallocating assets as necessary.
- **Business Development:**
  - Proactively identify and pursue opportunities to expand the client base through networking, referrals, and participation in relevant industry events.
  - Collaborate with other departments within the advisory business, such as tax specialists, estate planners, and legal advisors, to provide holistic wealth management services.
  - Stay informed about market trends, economic conditions, and

**Hiring organization**
Exec Capital

**Employment Type**
Full-time

**Beginning of employment**
1st October 2024

**Duration of employment**
Perm

**Industry**
Wealth Management

**Job Location**
London

**Working Hours**
9-5

**Base Salary**
£ 250,000 - £ 350,000

**Date posted**
August 28, 2024

**Valid through**
30.09.2024

regulatory changes that may impact clients' financial plans.

- **Compliance & Risk Management:**
  - Ensure all advice and services provided comply with UK regulations, including FCA guidelines, and adhere to the firm's internal policies and procedures.
  - Maintain accurate and up-to-date client records, ensuring all documentation is completed in a timely and compliant manner.
  - Actively manage and mitigate risks within the portfolio, ensuring that clients' wealth is protected and grows sustainably.
- **Team Leadership & Collaboration:**
  - Mentor and support junior wealth managers and financial advisors, sharing expertise and promoting professional development within the team.
  - Work collaboratively with the broader advisory team to deliver exceptional client service and contribute to the overall growth and success of the business.

**Qualifications**

## Qualifications:

- Bachelor's degree in Finance, Economics, Business, or a related field. A Master's degree or relevant professional qualifications (e.g., Chartered Financial Analyst (CFA), Chartered Wealth Manager (CWM), or Certified Financial Planner (CFP)) is highly desirable.
- A minimum of 8 years of experience in wealth management or financial advisory roles, with a proven track record of managing relationships with HNW and UHNW clients.
- Deep understanding of financial markets, investment products, and financial planning strategies.
- Strong knowledge of UK financial regulations and tax laws.
- Excellent interpersonal and communication skills, with the ability to build trust and rapport with clients.
- High level of professionalism, integrity, and ethical judgment.
- Strong analytical and problem-solving skills, with a client-centric approach to wealth management.

## Key Competencies:

- Client Relationship Management
- Investment Expertise
- Business Development
- Regulatory Knowledge
- Leadership and Mentorship
- Communication and Influence
- Analytical Thinking
- Ethical Judgment

**Job Benefits**

**Compensation:** Exceptional base salary together with significant performance-based bonuses, along with a comprehensive benefits package including pension contributions, private healthcare, and professional development opportunities.

**Contacts**

Exec Capital are a leading recruiter for Wealth Management Professionals