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**ROLE: Financial Analyst REPORTS TO: Head of Wealth**

**BACKGROUND**

Kingswood Holdings Limited (trading as Kingswood) is an AIM-listed integrated wealth management group, with more than 16,000 active clients and c. £4.8 billion of Assets under Advice/Management. It has a growing network of offices across the UK as well as offices in New York, San Diego & Atlanta as well as Johannesburg, South Africa. Clients range from private individuals to some of the UK’s largest universities. The Group’s vision is to become a leading global provider of trusted wealth planning and investment management solutions to clients, underpinned by investment in people and innovation in technology to support our advisers and clients.

## SUMMARY OF ROLE

This is a varied, hands on role reporting into the Head of Wealth, to manage the business intelligence needs and provide commercial support to the wealth business.

**RESPONSIBILITIES**

**Key tasks:**

* The Financial Analyst must have strong analytical skills - building, monitoring and reporting MI from internal systems to assist in understanding sales force efficiency and business performance.
* Produce data analysis at regular intervals and in a timely way for senior management review.
* The Financial Analyst will have the ability to run with business projects both ad hoc and strategic.
* The Investment Management / Wealth Planning firm is looking to build a new/enhanced sales pipeline/opportunity stage tool that can be used in the firm’s remote locations potentially SharePoint base.
* The role will have strong technical and data abilities, with strong Access, Excel and SQL skills.
* Ability to distil information into slide decks/policies for presentation/implementation.
* Ability to investigate broader wealth industry comparatives and trends to provide market comparisons as the firm looks to evolve their business (e.g. look at pricing of different competitor offerings and report back)

**Candidate:**

* Minimum 2 years’ experience in Financial Services/Wealth Management industry, ideally within Business Analysis or an interest in this area.
* Articulate, with excellent interpersonal skills; capable of liaising with senior stakeholders.
* Excellent written and oral communication skills.
* Highly proficient in MS Office suite – Excel, Word, PowerPoint.
* Strong working knowledge of Access and SQL