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JOB TITLE: Product & Proposition Manager REPORTS TO: Head of Wealth Planning

Kingswood Holdings Limited (trading as Kingswood) is an AIM-listed integrated wealth management group, with more than 16,000 active clients and c. £5 billion of Assets under Management. It has a growing network of offices across the UK as well as offices in New York and Johannesburg. 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 fantastic and exciting time to join Kingswood as we continue on our journey of growth!

Kingswood is now looking for a driven and experienced individual to act as the guardian of the Wealth Planning Proposition, providing continued management and oversight of the Advised and Referred Product Panel and the Financial Advice Service Proposition.

The successful candidate will work across the Wealth Planning function and the wider group to deliver a progressive Wealth Planning proposition for our client’s. This will include the client advice journey, considering and proposing best use of technology and tools to provide for a frictionless client experience.

This role can be based in London or South / East Yorkshire.

**RESPONSIBILITIES**

* Support Kingswood in the ongoing improvement of the proposition to meet client’s current and future needs.
* Implementation and on-going development of the Group’s Wealth Planning service proposition and associated enabling services
* Become a strong advocate of Kingswood’s values
* Direct accountability for the Wealth Planning Product and Service Proposition and Wealth Planning Advice and Referred product panel.
* Responsible for designing and implementing strategies that deliver against our overall strategy which consists of Propositional Excellence, Operational Excellence, Culture and Social Value
* Carry out market research and market analysis on wealth products for the relevant committees.
* To assist with the setup of the terms and conditions for all products in line with regulatory requirements.
* Produce management information to support the management of the products
* Ensure the business is fully aware of launched products
* Keep up to date with any changes in the market that could affect Kingswood’s range of products or could offer an opportunity

**Skills and Experience**

* Proven managerial experience in a Product / Proposition role in Financial Services is mandatory. Experience in a similar role within a Financial Planning or Wealth management business is highly desirable
* Experience in successfully defining, managing and developing wealth management propositions and associated enabling services, delivered through a range of distribution channels.
* An interest in leveraging technology to enhance the adviser and client experience.
* Excellent influencing, interpersonal and collaboration skills to effectively build networks and relationships both internally and externally.
* Ability to demonstrate gravitas and confidence to influence management teams and stakeholder

Please send your CV to [Linda.Tottem@Kingswood-group.com](mailto:Linda.Tottem@Kingswood-group.com) if interested.