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**ROLE: Data Manager REPORTS TO: Group CFO**

**BACKGROUND**

Kingswood Holdings Limited (trading as Kingswood) is an AIM-listed integrated wealth management group, with more than 16,000 active clients and c. £5.6 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 and a presence in 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

Kingswood is seeking an analytical professional who thrives on the chance to decipher data and systems and build business intelligence to support performance monitoring and decision making. As the Data Manager, you will oversee the development and use of Kingswood’s data management needs, ensuring that all information within the group runs timely and securely. This is a varied, hands on role reporting to the Group CFO and provides commercial support and analysis to the CEO and CFO.

The chosen candidate will have a strong aptitude for technology, a professional demeanour, and possess excellent troubleshooting skills. To excel in this role, you must have strong problem-solving and decision-making skills.

**RESPONSIBILITIES**

**Key tasks**

* Responsible for building, monitoring and reporting MI from internal systems to assist in understanding adviser efficiency and business performance
* Produce data analysis at regular intervals and in a timely manner for senior management review
* Run with business projects both ad hoc and strategic
* Distil detailed information into slide decks/policies for presentation/implementation
* Investigate broader industry comparatives and trends and provide market comparisons as the firm looks to evolve its business

**Candidate**

* Minimum 3 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 across all levels of the business
* Ability to translate complex problems clearly and in non-technical terms
* Willingness to ‘roll up sleeves’ and get into the weeds to assess issues and find solutions
* Excellent written and oral communication skills
* Highly proficient in MS Office suite – Excel, Word, PowerPoint
* Strong working knowledge of Access and SQL - SharePoint experience an added bonus

Interested candidates, please send your CV to [Linda.Tottem@Kingswood-group.com](mailto:Linda.Tottem@Kingswood-group.com)