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**ROLE: Business Intelligence Manager Reports to: 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. £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 Business Intelligence 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.

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.

**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

**The successful candidate will:**

* have a minimum of 3 years’ experience in financial services/wealth management industry, ideally within Business Analysis or an interest in this area
* possess advanced SQL skills. Power BI/Tableau or similar would be advantageous.
* be highly proficient in MS Office suite – Excel, Word, PowerPoint.
* ideally have SharePoint experience, but this is not essential
* be articulate, with excellent interpersonal skills, capable of liaising across all levels of the business
* be able to translate complex problems clearly and in non-technical terms
* be willing to ‘roll up sleeves’ and get into the weeds to assess issues and find solutions
* have excellent written and oral communication skills

Interested candidates, please send a CV to Linda.Tottem@Kingswood-group.com