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JOB TITLE: Regional Head (South), Wealth Planning 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. £6 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 senior leadership role, leading and managing a growing population of Wealth Planners across our offices in the South of England.

The role holder will directly lead what is initially a small team of wealth planners, though with acquisitions, the number of advisers falling under the remit of this role will rapidly grow over the remainder of 2021 and beyond.

Whilst the role holder will not have direct client relationships, they will lead from the front in developing the Kingswood business in the South of England and in growing our franchise.

The role holder will also work in partnership with Kingswood investment management teams to promote the Kingswood Investment Proposition.

They will also provide first line risk supervision for the wealth planners under their remit, responsible for their compliance with regulatory and professional standards and for their ongoing technical competence and professional development.

This is an FCA regulated role (CF30).

## KEY SKILLS AND EXPERIENCE

The role holder will: -

* Be a proven leader of client facing advisory teams in an IFA or Restricted Advice multi-site / peripatetic environment.
* Have built high performance teams that have delivered outstanding results over sustainable periods of time.
* Have experience of bringing together teams often from different backgrounds and heritages to perform in a One Best Way.
* Be able to act as an ambassador for Kingswood in the South of England, lead from the front and develop the business by building external relationships and networks.
* Have strong personal qualities (likeability, empathy, understanding and maturity), be a strong team player, be an effective communicator, be able to relate to and inspire the loyalty of colleagues and clients alike.
* Be adept at influencing and making an impact with the executive team at Kingswood.

We are looking for a candidate that also has the bandwidth and capacity to grow as Kingswood grows and take on a much larger role over time.

**RESPONSIBILITIES**

* Leadership of a team of multi-site, peripatetic Wealth Planners to deliver outstanding business results, an excellent client experience and compliant financial advice.
* Development of the franchise - to include the identification and attraction of new clients.
* Support the cultural and operational integration of acquired firms into one team doing things in a “one best way”.
* Assist the Head of Wealth Planning to set the direction of the distribution function and develop new ideas.
* Work closely with internal teams and the investment management team to promote propositions that are complementary to advice.
* Provide day to day supervision and technical guidance to the team and set objectives for individuals that are aligned with the strategic objectives of the business and the department.
* Maintain close working relationships with colleagues in operations, compliance, and other support areas, to ensure that client servicing is maintained efficiently, consistently and safely.

Interested candidates should send their CV to Linda.Tottem@Kingswood-group.com