****

JOB TITLE: CRM Business Analyst REPORTS TO: Head of WP Optimisation

Kingswood Holdings Limited (trading as Kingswood) is an AIM-listed integrated wealth management group, with more than 16,000 active clients and c. £6.2 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

Reporting to the Head of Wealth Planning Optimisation, this is a key role within the business, ensuring the businesses system of record, Iress Xplan is working optimally and ensuring keeping up to date with the changes being made to the system.

This role will suit motivated individuals who want to advance their careers in a dynamic change environment. For the right individual with a passion for technology, this role will provide direct experience of how technology can transform business operations and create innovative wealth management service.

**Responsibilities:**

* Day to day maintenance of System of Record CRM (Xplan), Client Portal and other Internal Applications
* Helpdesk User Support and fixing issues
* Work closely with Iress to ensure maintaining, working on projects and updating system as required
* Data analysis and design work on new and existing software initiatives
* Support the business with system and process design
* Configuration of system – to include cases and wizards for example
* Understand business requirements and work with business to update system
* Run queries and extract data in Xplan
* Support rollout of new technology and digital enabled services

**Personal Development**

* Maintain and record continuous professional development relevant to the role, including a close ongoing understanding of
  + Awareness of developments in the industry
  + regulatory developments
  + operational processes
  + technology enhancements

**Experience**

* This role would suit anyone who has experience with a Wealth Management system of record / CRM, ideally Iress Xplan), Client Portal, business process design and business user support.
* Experience of working within the wealth management sector, specifically in regards to Financial Advisors/ IFAs
* Heavily experienced in the entire business analysis lifecycle, with emphasis on process engineering, stakeholder management and requirements gathering
* Data migration experience - ideally you'll have the ability to show an organisation what "good" looks like (best practices and principles to follow when migrating data)
* Knowledge of products and platforms
* Passion to deliver a high-quality service to clients
* Organisational and communication skills

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