Rothschild

Job Specification

Job Title:	Analyst
Division:	Rothschild Private Wealth
Location:	London

Rothschild & Co

Rothschild & Co is one of the world's largest independent financial advisory groups. We offer a distinct perspective that makes a meaningful difference to our clients' business and wealth.

With a team of 2,800 talented financial services specialists on the ground in 40 countries across the world, we provide independent advice on M&A, strategy and financing, as well as investment and wealth management solutions to large institutions, families, individuals and governments. As a family-controlled business that has been at the centre of the world's financial markets for over 200 years, we can rely on an unrivalled network of specialists and are known for our track-record of outstanding execution in financial services.

Rothschild Private Wealth

At Rothschild Private Wealth we offer an objective long-term perspective on investing, structuring and safeguarding assets, to preserve and grow our clients' wealth.

At Rothschild Private Wealth we provide a comprehensive range of private wealth services to some of the world's wealthiest and most successful families, entrepreneurs, foundations and charities. In an environment where short-term thinking often dominates, our long-term perspective sets us apart. We believe preservation-first is the right approach to managing wealth.

Click here for more information on Rothschild Private Wealth

Overview of Role

Great wealth managers must provide a first class personal service, where team members truly know each client and understand their requirements, whilst also delivering on each client's investment requirements. To achieve this, we adopt a collaborative approach, splitting relationship and portfolio responsibilities between Client Adviser and Portfolio Manager teams.

Client Adviser teams are responsible for all elements of a client's relationship with Rothschild Private Wealth. This includes: working with clients to determine their investment requirements, co-ordinating investment advice and handling all day-to-day client needs. Teams are comprised of senior Client Advisers, Associates and Analysts, who support Client Advisers, and Administrators.

We are seeking to hire an exceptional Analyst to join one of our London based Client Adviser teams.

Responsibilities

- Production of portfolio reviews, investment proposals and other communications for clients / potential clients.
- Preparation of bespoke analysis for specific client situations.
- Pro-active monitoring and review of client portfolios, including: consideration of risk tolerance, tax, appropriateness of positions, missing opportunities, etc.
- Liaising with the investment team regarding investment recommendations and implementation.
- Co-ordination of new account openings – working with client advisers, administrators and compliance.
- Collating data and information for senior team members on markets and portfolios.
- Identifying opportunities for developing new clients for the team

Education and Qualifications

- A levels or equivalent: ABB or above
- Degree or equivalent: 2:1 or above

Experience, Skills and Competencies Required

- Highly numerate with excellent analytical ability
- Strong IT skills to include advanced Excel, PowerPoint and Word
- Excellent written English and highly articulate
- Strong organisational skills, ability to multi-task and maintain exceptional attention to detail even when working under pressure
- Can-do attitude, approach all tasks with energy and enthusiasm
- Exceptional communication skills
- Collaborative team player
- The highest levels of professional and personal integrity
- Curious and ambitious
- Knowledge and interest in financial markets and investments
- Experience of working at a financial services firm preferred but not essential