

# United Kingdom Jobs Expertini®

## Wealth Manager - Sheffield

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Company: HSBC

Location: United Kingdom

Category: other-general

Some careers shine brighter than others.

If you're looking for a career that will help you stand out, join HSBC and fulfil your potential.

Whether you want a career that could take you to the top, or simply take you in an exciting new direction, HSBC offers opportunities, support and rewards that will take you further.

Our Wealth and Personal Banking business supports millions of individuals, families, business owners, investors and entrepreneurs worldwide. We provide products and services that include current accounts, credit cards, personal loans and mortgages, as well as savings, investments, insurance and wealth management. We also have specialised relationship managers who support customers with bespoke requirements, including high net worth and ultra-high-net-worth.

What will I get to do as a Wealth Manager at HSBC?

Whether you're creating connections with customers or colleagues, Wealth Management is genuinely a relationship-based service. As a Wealth Manager, you'll have access to an impressive portfolio of wealth customers, growth potential, career progression, and an opportunity to bring your authentic self to team that prides itself on making connections and building relationships. You'll support every aspect of a customer's financial life, help them grow, manage and preserve their wealth, and provide a professional service in a world of increasing complexity.

Here's what else you'll be able to do in this role:

Manage and support a portfolio of high value premier customers.

Act as a trusted adviser to our new and existing customers providing holistic financial advice and supporting them through key life events such as investing for your future, saving for a new home, planning for retirement or protecting their family for every eventuality.

Conduct in depth reviews to identify personal and financial needs of customers and deliver a consistent and tailored wealth management and financial planning service to a portfolio of HSBC clients.

Advise on a full range of products and services that include both HSBC manufactured products and those provided by external partners.

Deliver needs-based solutions through effective communication and influencing.

Continuously monitor and gather information to assess potential impacts and identify possible risks and opportunities for the business.

## Requirements

What does it take to be successful as a Wealth Manager?

People-oriented individuals looking to build their portfolios, safely grow the HSBC Wealth and Personal Banking business, and move the needle on their careers.

Do you like a challenge? Are you competitive and base your success on performance? Do you have a growth mindset and a drive for reward? Do you enjoy working with colleagues and clients to create meaningful connections and build lasting relationships?

Do you use the many resources and the diverse, talented co-workers around you to help answer the hard questions?

If you answered yes to any of these questions, we want to meet you!

What we'll give you:

Growth - Opportunity for personal development and progression, new clients, a robust and supportive network of colleagues, new products, and new opportunities to learn and sell on our Wealth Management team.

Security in the form of flex benefits, financial support for relocation, non-contributory pension, life insurance, employee discounts, share options, annual bonuses, and private medical care.

Steppingstone to work internationally - this can be your place to start and branch out to

anywhere we have offices around the world.

Full training in HSBC products and services with ongoing coaching throughout your career and dedicated admin support

An opportunity to contribute to the ongoing success of the business, by being an inclusive team member with the prospect to be involved in multiple initiatives to make a difference.

The support you need to fulfil your potential.

What you'll give us:

Hold role relevant Level 4 qualifications (Dip CII, CISI or equivalent QCF RDR level 4 qualification) and meet current Statement of Professional Standing requirements - essential.

Currently hold CAS status is desired.

Previous experience providing holistic financial advice on a wide range of products and services.

Have previously worked as a Wealth Adviser, IFA, Financial Planning Manager or in a similar role.

Experience working in relevant environments (retail banking, relationship management, front office)

Being open to different points of view is important for our business and the communities we serve. At HSBC, we're dedicated to creating diverse and inclusive workplaces. Our recruitment processes are accessible to everyone - no matter their gender, ethnicity, disability, religion, sexual orientation, or age.

We take pride in being part of the Disability Confident Scheme. This helps make sure you can be interviewed fairly if you have a disability, long term health condition, or are neurodiverse.

If you'd like to apply for one of our roles and need adjustments made, please get in touch with our

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