Investment Consultant role profile

CARTWRIGHT

Cartwright is currently recruiting for an Investment Consultant in either Farnborough or Godalming to join our Investment Team. The role will be primarily responsible for leading on, and developing, a portfolio of existing and new investment clients whilst contributing to the overall growth of the team's investment consulting services. This an exciting time to join and influence a fast growing innovative team which has high quality client-focused independent investment advice at its heart.

About us

Cartwright is an independent privately-owned business established in 1986 to fill a gap in the market by providing high quality services to small/medium sized UK occupational pension schemes. We are now a trusted advisor to around 200 clients. We pride ourselves on being passionate about our business and the levels of customer service we provide. Our Investment Team has experienced considerable growth under the leadership of our Director of Investment Consulting (Sam Roberts).

About the role

As an Investment Consultant some of your key responsibilities will involve:

- Acting as the lead investment consultant on a range of clients, both as the day-to-day contact and on relevant projects (eg fund selection, asset transfers, bulk annuity transactions).
- Understanding clients' wants and needs, and pro-actively helping clients to achieve them through reliable and consistent strategic advice, plus a willingness to innovate and challenge the status quo.
- Coordinating client work and timely delivery to the client/internal consultant.
- Attending client meetings, reviewing meeting minutes and promptly following up on actions.
- Active member of the Cartwright fund research group.
- Being an ambassador for Cartwright and the Investment Team both internally and externally (eg at conferences).
- Contributing to the thought leadership of the business through research and development.
- Contributing to the growth of the firm through new business tenders, general business development, and recognising opportunities across the firm (even if not investment-related).
- Reporting to the Director of Investment Consulting.

Your skills and qualifications will ideally include:

- Consistently acting with the highest integrity and professional standards.
- Strong interpersonal skills with the ability to build and maintain working relationships both internally and externally.
- Qualified actuary or CFA charterholder, and CF30 authorised.
- Excellent communication skills, both oral and written.
- Proven experience on advising UK occupational pension schemes, including: setting investment strategies, researching and selecting appropriate funds (including between active and passive), bulk annuity transactions, designing asset triggers, arranging asset transfers, and monitoring the trustees' investment decisions.
- A good understanding of: areas of relevant investment theory, applicable regulatory/legislative rules and compliance (eg FCA client categorisation), all main asset classes and how they interact, the characteristics of different pooled fund vehicles and investment platforms, design and implementation issues for defined contribution schemes, and current industry trends.

Salary and Benefits

This role offers a highly competitive salary, plus bonus and benefits.

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