

# Private Banking Full-Time Analyst

## UK/International Private Banking

### Purpose of role

- Works for the Private Banker in acquiring, servicing and retaining clients to deliver overall business goals and performance targets.
- Provides a first class service to the clients, supporting the Private Bankers and PBEs (Private Banking Executives) with all day-to-day matters across products and services.
- Supports the marketing of products to clients to assist the Private Bankers in exceeding performance targets through analysis and research identifying new business opportunities with new and existing clients.
- Develops a broad skill set required to enable the Analysts to pass the assessment for fast track promotion to Junior Private Banker at the end of the 3 year graduate programme.

### Core accountabilities

Analysts will spend six months with the Investment and Product Office as part of a rotation. During this time they will be set specific and appropriate objectives by their local team leader. The remainder of their three year programme will be spent supporting Private Banking teams. During this time the focus for the accountabilities for the Analyst role will change from year to year as shown below:

**Year 1 75 % (A), 25 % (B)**

**Year 2 60 % (A), 40 % (B)**

**Year 3 40 % (A), 60 % (B)**

#### (A) Client Administration

- Assists Private Bankers in administration and management of client relationships including attending meetings, preparation of file notes, drafting of letters and other documentation, annual client reviews - all overseen and signed-off by the Private Banker.
- Develops client relationship skills through observation of Private Bankers at client meetings/events/interactions and coaching through role-play scenarios.
- Shows exceptional knowledge of platform technology and operational procedures. Ensures quality, accurate and timely execution of all client and administrative items and reporting of all risk events and complaints.
- Supports PBEs in handling incoming mail, faxes and phone calls from clients.

#### (B) Asset Growth and Revenue – Identifying Business Opportunities and Supporting Sales

- Monitors the relationship with the clients, working for the Private Banker to ensure quality service is provided at all times. This includes attendance at client meetings, where appropriate.
- Develops strategies with the Private Banker for growing new and existing AuM (Assets under Management).
- Develops a sales strategy for the Private Banker to exceed performance targets.
- Project management responsibilities including sales drives, product launches and research projects.

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We are an equal opportunity employer and we are opposed to discrimination on any grounds. If this position requires the person to be an Approved Person under the Financial Services and Markets Act 2000 (FSMA), disclosure of spent convictions within the meaning set out in the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975 will be required.

- Acts as liaison between Private Banker and specialist product areas, e.g. Investment Management, Credit, Fiduciary, etc to ensure the smooth operation of services. Champions strategic initiatives e.g. new products.
- Prepares letters and ad-hoc reports for clients and drafts letters for Private Bankers.
- Undertakes analysis and research projects for the Private Banking team and the wider business.
- Assists the Private Banker in ensuring adherence to global compliance policies.
- Performs daily operations and transactions on clients' accounts

## Supervisory responsibilities

None. May act as a buddy to subsequent Analyst and Intern intakes.

## Role requirements

### Professional/technical experience

- Some understanding of Bank's products and services, in particular Investment products and services.
- Able to demonstrate up to date knowledge of relevant changes in the industry.
- Able to demonstrate integrity and discretion.

### Academic and professional qualifications

- Educated to degree level.
- CFA Level I an advantage but not a necessity.

### Personal attributes

- Ability to multi-task, plan and organise work and set priorities
- Excellent communication skills
- Positive and self motivated
- Strong Interest in financial markets
- Ability to work under pressure with a heavy workload
- Excellent interpersonal skills and clear team player
- Excellent customer service skills and sensitivity to the needs and profile of high net worth clients
- Ability to market appropriate products and services and to become creative in offering solutions to client needs

## Program Description

The Analyst Programme is 3 years in length. Upon joining Barclays Wealth, you will attend our extensive Initial Training Programme in the London office to learn about the financial markets, products, tools and services we offer our clients. It is an intensive, interactive program, which will provide a foundation for you to begin your career with us. Following this training, Full-Time Analysts will then join their respective office for their first year on the programme with a private banking team. During the second year of the programme, Full-Time Analysts will undertake two rotations: 6 months in our Investment & Product Office division and 6 months on an international placement. For the final year of the programme, Full-Time Analysts

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will return to their original private banking team that they started with in their first year. At the end of the third year, Full-Time Analysts can then put themselves forward for consideration for promotion to Junior Private Banker.

The CFA (Chartered Financial Analyst) forms an important part of the 3 year Analyst Programme – graduate will undertake the exams for each of the three levels of this qualification in June each year. Successful completion of the CFA is a mandatory part of the graduate programme.

## Locations

Barclays Wealth currently has Full-Time Analyst opportunities in Private Banking teams available in the following offices:

UK - London, Birmingham, Leeds, Manchester, Bristol, Bournemouth, Newcastle, Liverpool

International - Geneva, Monaco, Madrid, Lisbon, Milan, Dubai, Singapore, Hong Kong, Mumbai, Johannesburg

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