

Private Banking Summer Analyst

UK/International Private Banking

Purpose of role

- To gain an understanding of the role of a private banker and the wealth management industry through attending all intern programme training and networking events as well as on-the-job-experience.
- Shadows the Private Banker and helps them 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 Summer Intern to pass the assessment for an offer on the full time graduate programme for the following year's intake.

Core accountabilities

(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.
- Handles incoming mail, faxes and phone calls from clients, interacting with the relevant support departments and confirming all relevant actions to the clients.

(B) Identifying Business Opportunities and Supporting Sales

- Undertakes analysis and research projects for the Private Banking team and the wider business.
- Develops strategies with the Private Banker for growing new and existing AuM (Assets under Management).
- Prepares letters and ad-hoc reports for clients and drafts letters for Private Bankers.
- Assists the Private Banker in ensuring adherence to global compliance policies.
- 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.
- Performs daily operations and transactions on clients' accounts (where appropriate).

Supervisory responsibilities

None.

Role requirements

Professional/technical experience

- Able to demonstrate up to date knowledge of relevant changes in the industry.

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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.

- Able to demonstrate integrity and discretion.
- Some understanding of Bank's products and services, in particular Investment products and services.

Academic and professional qualifications

- Currently studying towards a degree or Masters (between penultimate and final year of study).

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

Program Description

The Summer Analyst experience will differ depending on which location you join but typically involves an initial week of training followed by countless opportunities during the summer for further training, networking and social events as well as unrivalled access to our senior business leaders. You'll receive an appraisal half-way through your programme and again at the end and top-performing interns will be offered a position to return on our Full-Time Analyst Programme the following year.

Locations

Barclays Wealth currently has Summer Analyst opportunities in Private Banking teams available in the following offices:

UK – London

International - Hong Kong, Mumbai, Singapore

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