Associate Portfolio Management

Stanhope Capital was established in 2004 and is an independently owned wealth management firm providing discretionary and portfolio management services to ultra-high net worth private and institutional clients worldwide. Stanhope is neither a bank, nor just a family office. Instead, we bring together the best of both worlds: the high service standards and transparency expected of a private family office, combined with the quality of investment expertise and operational excellence typically associated with a major global financial institution. There are currently 18 partners and just under80 employees operating from offices in London, Geneva and Jersey.

Stanhope Capital employs the best investment professionals across the industry providing an environment to develop their career and gain a broad knowledge of the wealth management industry.

Our overriding objective is to protect and increase the real wealth of our clients by achieving superior returns while minimising investment risks to an agreed level.

Our Wealth Management and Consulting units operate on an open architecture basis. The teams are led by highly experienced professionals with strong track records investing across asset classes. We aim at finding the best investment managers and solutions across all asset classes, irrespective of geographic location.

Position: Associate - Portfolio Management
Location: London
Job Type: Full Time, Permanent
Salary: £Competitive
Benefits: 25 days annual leave, generous pension scheme, private Healthcare, weekly bootcamp, attractive LTIP, being part of a growing successful company; multinational, young and dynamic working environment.

About the role:
The Role is to be an Associate in the Portfolio Management Team, supporting the international clients managed from our London office. The Portfolio Management Team is the internal division which manages the client relationships and has day-to-day responsibility for the asset management and investments. The other wealth management divisions are Investment Research, Middle Office and Support Functions.
The Portfolio Management department in London is divided into sub-teams. The role will involve working in a team led by a Partner whose clients are French speaking. The growth of the business and the complexity of the portfolios have meant that an exceptional candidate is sought to join the team. This is a diverse role and will suit a hard-working individual who is seeking to gain a broad base of experience in a successful, growing investment management firm.
The successful candidate is likely to have 2-3 years in a similar role in either investment banking or investment management looking to specialise in wealth management.

Main Responsibilities:
On a daily basis, the Portfolio Management team assists Client Partners with the management of their book of clients. The duties will include but will not be limited to:

- preparing client presentations for both prospective and existing clients
- assisting with the preparation and review of monthly and quarterly client valuations
- preparing, co-ordinating and delivering bespoke client reports
- co-ordinating and developing strong working relationships across the firm including Middle Office, Investment Research, fellow members of the Portfolio Management team as well as Legal and Compliance.
- operational tasks such as preparing trade instructions and following these through to confirmation with the custodian; updating operating memorandum to reflect any changes in the management of the clients' portfolio
- co-ordinating documents and monitoring for client specific vehicles such as SICAVs
- assisting with client 'on boarding' and collating information required by our clients' tax accountants

- performing KYC and AML checks in conjunction with Compliance
- facilitating day to day banking transaction for specific clients

Skills and Characteristics:
The successful applicant will possess the following skills:

- fluency in French and English (verbal and written) – is essential!
- excellent numeracy skills
- exceptional attention to detail
- proficiency in Excel, Word, PowerPoint
- familiarity with banking platforms
- able to work under pressure
- highly organised, motivated and capable of seeing projects through from beginning to end
- flexible, able to work autonomously as well as take direction as needed
- results oriented – a flexible thinker with a "can-do" attitude
- experience in building strong and effective internal and external relationships
- absolute discretion

No terminology in this advert is intended to discriminate on the grounds of gender, race, disability, age, sexual orientation, religion, or belief, and we confirm that we will gladly accept all applications.