Stanhope Capital

Stanhope Capital Group – Associate/Senior Associate, Stanhope Consulting

Stanhope Capital Group provides asset management and advisory services to private clients, charities, and institutions around the world. Founded in 2004, the group offers a full range of services – wealth management, consulting, merchant banking and alternative investments – in an environment where the interests of partners and employees are aligned with clients.

After the mergers with US based FWM – owner of Forbes Family Trust, LGL and Optima – and Arche Associates in Luxemburg, Stanhope Capital Group is one of the world's largest independent global wealth management and advisory firms overseeing close to £25 billion of client assets with offices in London, Geneva, Paris, Luxemburg, New York, Philadelphia, and Palm Beach.

Stanhope positively encourages applications from suitably qualified and eligible candidates regardless of gender, race, disability, age, sexual orientation, religion, or belief. We seek to create a flexible environment which ensures our working styles work for each other and our clients. If you are interested in learning more about our flexible working approach, we would be happy to discuss it.

About the role:

This is an exciting opportunity for someone with at least three years' experience in financial services to become part of the firm's advisory business, Stanhope Consulting, and to gain broader investment consultancy experience. The role spans a wide range of responsibilities including developing client relationships, carrying out independent investment research and assistance with one off projects and business development.

The Consulting team currently has six members and has a strong team based culture. You will work alongside the current team members on a wide variety of responsibilities. The role involves:

- Preparing bespoke periodic reports for clients, including analysis of the main issues to raise with the client
- Collection/calculation of portfolio data and maintenance of performance spreadsheets
- Dealing with ad-hoc client requests and queries
- Assistance with preparing client meeting presentations and new business pitches
- Research meetings with investment/fund managers and production of manager and fund research notes
- Assistance with one-off pieces of client work such as manager and strategy reviews and manager selection
- In time we would expect you to be involved directly with client meetings and presentations.
- You will also be expected to maintain a broad knowledge of the market environment and investment products and contribute to internal discussions on such topics

About you:

- At least three years' experience working in a related role within financial services
- Some knowledge of the investment management industry
- Comfortable working autonomously and collaboratively with strong time management skills
- Good command of Microsoft Office applications and advanced knowledge of Excel
- Excellent verbal and written communication and presentation skills
- Highly numerate and excellent attention to detail
- Hard-working and self-motivated with a solutions-oriented and proactive approach to problems and tasks
- Ability to think critically and challenge and/or support others on investment ideas
- Willingness to learn and develop on a continuous basis

You would additionally benefit from:

- Experience using Bloomberg and Morningstar Direct
- Genuine interest in responsible investing
- Client-facing experience

Apply with your CV and Cover Letter