

## **2021 Wealth Management Charities Trainee Programme (12 month, fixed term contract)**

### **Who we're looking for**

Schroders' trainee programme is your chance to gain a year of hands-on, paid work experience. If you've just finished your A-levels or your BTECs then this programme provides you with a chance to explore the world of work. We also accept applications from graduates.

Although you may have never heard of Cazenove Capital (the wealth management and charity arm of Schroders) before visiting our website, this trainee programme could be for you because key to the purpose of the programme is to teach you about what, why and how, we conduct our business.

On this programme, you'll be joining our Charities Team.

As a trainee, you will receive ongoing training designed to enhance your development, where you will have the chance to improve your skills and finesse your technical knowledge. We will support you to take the Investment Foundation Certificate, which is a professional industry qualification and you'll be paid competitively for this role.

### **About Schroders**

We're a global investment manager. We help institutions, intermediaries and individuals around the world invest money to meet their goals, fulfil their ambitions, and prepare for the future.

We have around 5,000 people on six continents. And we've been around for over 200 years, but keep adapting as society and technology changes. What doesn't change is our commitment to helping our clients, and society, prosper.

### **About Schroders Wealth (Cazenove Capital)**

Cazenove Capital is the wealth management and charity investment arm of Schroders. We are responsible for £58.4 billion assets under management. Our clients include high net worth individuals, trusts, family offices, charities and their advisers who are able to benefit from the deep resources of a global asset management firm and a FTSE 100 listed company.

### **The base**

We moved into our new HQ in the City of London in 2018. We're close to our clients, in the heart of the UK's financial centre. We offer flexible working appropriate for a client solutions focussed role.

### **Investment20/20**

You will join as a trainee as part of the Investment20/20 programme, you will have opportunities to meet and network with trainees across the industry and participate in training, socials and insight events.

### **The Wealth Charities team**

The not-for-profit sector is very important to the continuing success of our business. We have been working with charities for more than 80 years, and are proud that our first client is still with us today. We are delighted to be the number one charity investment manager in the UK.

More than 1,500 charities, foundations, endowments and other non-profit bodies have entrusted us with £8.2 billion assets under management. Recognising the erosive effect of inflation as a key risk, the majority of our clients have investment objectives based on maintaining the value of capital in real terms while generating a sustainable level of income to support ongoing activities.

We provide a full range of services including discretionary asset management, custody and execution services, cash management, financial planning, deposit-taking and specialised lending.

We aim to provide customised investment management services to the full spectrum of the charity sector. Our 27-strong award-winning team represents a good mix of experience, enthusiasm and expertise.

### **What you'll do (Charities)**

Some of the tasks and projects you'll be involved in are:

- Assisting portfolio managers with everyday client service and reporting.
- Helping to ensure client queries are dealt with
- Providing administrative support to the team for meetings and presentations
- Gaining insight to markets and their behaviour
- Building your investment knowledge through working with fund managers
- Learning about integrating environmental, social and governance factors into investment.

### **The knowledge, experience and qualifications you need**

- Although we usually ask you to have achieved at least 96 UCAS points to be eligible for this role, we appreciate the need to be flexible given the on-going pandemic and disruption to your school/ college life. If you've achieved a little under 96 UCAS points in the academic year 20/21, we would still encourage you to apply
- You must be 18 years old by Monday 6th September to apply for the 2021 intake

### **The knowledge, experience and qualifications that will help**

- A flexible approach and willing to get involved in variety of tasks and projects
- Attention to detail and accuracy
- A work hard ethos and a can do attitude
- A thirst to learn and a willingness to contribute to the team

Ultimately, we can teach what you need to know about the job we just need you to bring your drive, passion and enthusiasm to make the most of the opportunity to start building your career.

### **What you'll be like**

- You'll be an enthusiastic self-starter who is eager to learn more about our industry and our business
- A team player with a pro-active approach to getting things done, you'll love a challenge and are keen to work in an exciting and interesting environment.

### **We're looking for the best, whoever they are**

Schroders is an equal opportunities employer. You're welcome here whatever your socio-economic background, race, sex, gender identity, sexual orientation, religious belief, age or disability.

Please note we recruit on a rolling basis so recommend you apply early.

**Start date:** Monday 6 September 2021