Junior Client Service Specialist (Graduate Position Spring 2021 Start)

About Insight

At Insight, innovation drives the development of our investment capabilities and continuous improvement is at the heart of the way we operate. We strive to maintain a strong collaborative culture where you can deliver outstanding results, be highly engaged in your work and develop your career. We encourage long-term thinking and putting our clients first. The key to our success is our people, and the partnerships we build with our clients.

We are a leading global asset manager with £731.5bn in AUM (as at 30 September 2020). Launched in 2002, we have won industry recognition for our investment capabilities across liability driven investment, fixed income, specialist equities, multi asset and absolute return. Innovation drives the development of our investment capabilities.

The Client Service Team

The Client Service Team form an integral part of an institutional clients' relationship team, alongside the Client Director and Solution Design teams. The Client Director is responsible for owning the commercial relationship and strategic direction of the client, whereas the Client Service Specialist is responsible for ensuring the successful delivery of the mandate from a day to day perspective. The Junior Client Service Specialist will work alongside a more senior colleague on a number of named client accounts to ensure "best in class" service delivery.

The team is responsible for supporting the business in the delivery of exemplary service to a range of clients consisting of Insurance Companies, Financial Institutions, Pension Funds and other institutional investors. Client mandates vary from smaller clients investing in pooled vehicles with less than £10 million to substantial corporate mandates of increasing complexity. The team's performance is critical to the success of the business as a whole. The role of the team, and of each individual, is to absorb and manage as much as possible of the client service workload created by the clients and consultants.

Role Responsibilities

- Working under the direction of the Senior Client Service Specialist to ensure smooth transition of mandates to Insight during the onboarding phase.
- Supporting the delivery of business as usual activity and ad hoc requests from clients, working closely with Senior CSS, Client Directors and Investment Professionals from across the business.
- The production and delivery of a range of bespoke reporting to segregated clients.
- Involvement in ad-hoc project work as it occurs to the wider benefit of the Client Solutions Group.
- Respond promptly and professionally to day to day and ad hoc client and consultant requests.
- Manage key tasks associated with client change activity including onboarding new clients and changes to existing client mandates, investment guidelines and fee schedules.
- Ensure client documentation including Investment Management Agreements and Instruction documentation is managed and stored appropriately in the client folder.
- Liaise with internal colleagues to ensure delivery as advocate for the client, including: Investment Reporting, Legal, Derivative Operations, Cash Management, Regulatory Reporting and Finance & Invoicing.
- Develop detailed knowledge of the clients and the environment in which we provide investment solutions.
- Ensure that Insight has all necessary information in order to comply with regulatory obligations both for Insight and on behalf of our clients.
- Attend client events, where appropriate, to support the CD and Senior CSS and build an independent relationship with the client.

As a Junior Client Service Specialist, you will be sponsored to undertake the Investment Management Certificate (IMC) qualification. There will also be an opportunity for you to spend a 3-6 month secondment in a related team during your first two years.

What we're looking for

- Minimum 2:1 (or equivalent) Bachelor's/Master's degree or equivalent at an accredited university
- Strong analytical and problem-solving skills
- Proven record of working collaboratively
- Curiosity about economics, finance or investment finance
- Outstanding communication skills, ability to articulate ideas clearly
- Ability to operate in a changing environment and challenge the status quo, innovative
- Proven record of taking the initiative to act, self-starter
- Inquisitive, strong desire to learn and grow professionally

How to Apply

If you're interested in joining an exciting, innovative financial services company, please complete your online application by Sunday 10th January.

Applications will be reviewed on a rolling basis and our final round assessment centre will be held virtually in early February. We therefore strongly encourage you to apply early.

Apply here https://www.insightinvestment.com/uk/careers/graduates/graduate-programme/