

Business Operations; Degree Apprentice Programme

Job Title:	LGT Degree Apprentice
Team/Department:	Business Operations; Rotations in Client Services & Custody Services
Degree Apprenticeship	Chartered Manager
Degree Awarded	BSc Business Management (Social Change)
University	Queen Mary University London
Remuneration:	Salaried & Discretionary Bonus
Position:	18 Month Fixed Term Contract / Full Time
Core Office Hours:	9.00 a.m. – 5.00 p.m. Monday to Friday
Flexible Working	We operate a flexible hybrid working approach
Location:	14 Cornhill, London, EC3V 3NR
Effective Date:	September 2022

Business Operations Degree Apprenticeship

This entry level degree apprenticeship is an outstanding starting point for a career in Business Operations.

Over a four year programme, you'll be rotated across a number of teams/areas to provide you an in depth introduction in Business Operations and Wealth Management more generally. Your role will evolve and develop as the business does and you will be provided with opportunities to build and develop your long-term career at LGT Wealth Management.

You will be part of our busy Business Operations based teams, who are responsible to provide high quality and efficient oversight, processing and reporting across all our business/client related activities.

This is an opportunity to learn about the wealth management industry, develop your business analytical skills and understand how our Business Operation functions provide support to our client-facing teams and ultimately how we provide a best in class service to our clients.

As an LGT Degree Apprentice, you will be expected to undertake a BSc Business Management (Social Change) degree, and progress to an Analyst within a four year timeframe subject to your completion of your degree apprenticeship and performance within your role.

For the first year of your apprenticeship, you will be part of the Investment20/20 programme, you will have opportunities to meet and network with trainees across the industry and participate in additional training, socials and insight events.

Business Unit Rotations

Our Business Operations Approach

When LGT was formed it was agreed that all Business Operations functions would be managed internally. Taking this approach provides us greater flexibility to the service we are able to offer our clients, rather than being tied to the restrictive Service Level Agreements by outsourcing certain functions to different businesses. As there are no external providers involved, all processing for both London & Jersey clients is undertaken in house. Across all of our Business Operations teams we have approximately 100 staff and are continuing to expand due to the exciting growth of our UK and Jersey business.

Below is an overview of our Business Operations teams that you will gain exposure to during your apprenticeship.

Custody Services:

Operations is the engine room of our Firm providing a wide range of essential support and services for the Investment/Wealth Asset Managers, their teams, and their Clients.

The Custody Services unit comprises several teams:

- Settlements team: Responsible for the accurate and timely settlement of all trade purchases and sales for the Firm in Funds, Equities and Bonds both in the UK and overseas.
- Corporate Actions team: Processing of dividend distributions and interest on fixed income products (including the appropriate tax withholding) or mandatory/voluntary corporate events for the Firms assets under management.
- Transfer team: Manages all aspects of the client transfer in/out process for all product types.
- Treasury team: Manages all the Firm's cash movements in multiple currencies and the funding of its bank accounts. This also includes maintaining relationships with our sponsoring banks and those organisations we hold term deposits with.
- Data Management team: Responsible for providing support in delivering on the firm's data strategy for Operations by establishing and maintaining data processes, controls, procedures, and methodologies in line with agreed firm wide governance policies and standards.
- CASS team: Oversees the Firms compliance with the FCA's client asset rules contained within the Client Assets Sourcebook (CASS).

Client Services:

Our Client Services Team plays an important role in acting as a link between Front Office and Operations by assisting both areas to meet the client's needs.

Our Client Services unit comprises of several teams including:

- Client Reporting team: Covers a wide range of client reporting related activities and monitors the accuracy of portfolio performance and ensure quarterly valuations and year-end tax packs are provided to clients.
- Client Product Support team: Provides ownership and support for all services relating to non-custodied investments.
- Client Due Diligence team: Responsible for performing due diligence when on-boarding clients, which includes KYC / AML reviews in accordance with FCA regulations and company policies, and account closing. This team works closely with the Front Office, Compliance and Legal teams.
- Client Dealing team: Responsible for the execution of all trades across our business.

Key Responsibilities:

Full training will be given

- To learn how we explore, research, and create/enhance business opportunities in line with regulatory changes and developments in the market.
- Shadow meetings and team training events.
- Learn how to compile reports and analyse data.
- Answer inbound queries from our stakeholders.
- Provide (and in time take ownership of) administrative support to the teams you work with and projects as needed.
- Ensure the administrative and organisational tasks of your team are completed accurately, efficiently and in a timely manner.
- Perform other duties as assigned

Principal Contacts

- Investment & Wealth Managers (internal staff)
- Investment Assistants (internal staff)
- Custody Services, Client Services and IT & Business Solutions Team Heads
- Service providers

Your Skills

We are keen to receive applications from all backgrounds. If you are an enthusiastic individual with a desire to embark on a career in Business Operations within the Financial Services sector and have the following attributes, we would like to hear from you.

- Although the course requires candidates to hold or have predicted (August 2022 results pending) A-level grades of 3 A's or the equivalent BTEC points 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 the course entry requirements, we would still encourage you to apply.
- You have strong numerical literacy and enjoy working with large amounts of data
- You are a good communicator – both verbal and written, and enjoy working within a team environment.
- You have demonstrable experience of being able to manage prioritise workloads/studying with a keen eye for detail
- You are enjoys solving problems and using your initiative when completing work
- You have a good level of computer skills including good knowledge of using Microsoft Excel and Word.

You do not need to have previous experience or a working knowledge of Wealth Management to apply – we can teach you what you need to know about the industry in order to contribute to your success in the role.

For full details of the LGT Wealth Management Degree Apprenticeship Programme and how to apply please download the full job description.

LGT 2022 Degree Apprenticeship Programmes

The best of both worlds; Gain a university degree and start your career at the same time

If you are in your final year of school or college, predicted to gain A-Levels or equivalent and considering your future options about either going to university or finding your first role to start your career, we want you to consider making your next choice with LGT.

Our degree apprentice programme will introduce you to the Wealth Management sector where you will develop your industry knowledge, on the job work experience and gain a degree level qualification enabling you to gain the best possible platform to start your career.

Our Degree Apprenticeships

Our degree apprenticeships will be carried out in partnership with the University of Exeter and Queen Mary University of London, both UK Russell Group universities.

This year, we are delighted to offer the following degree apprenticeship opportunities:

Department	Degree Awarded	Degree Apprenticeship	University
Business Operations	BSc Business Management (Social Change)	Chartered Manager	Queen Mary University of London
Central Management Team	BSc Business Management (Social Change)	Chartered Manager	Queen Mary University of London
Information Technology & Business Solutions x2	BSc (Hons) Digital and Technology Solutions	Digital and Technology Solutions Professional	University of Exeter
Central Investment Team	BSc Applied Finance	Financial Services Professional (CFA Pathway)	University of Exeter
Model Portfolio Service	BSc Applied Finance	Financial Services Professional (CFA Pathway)	University of Exeter
US Team	BSc Applied Finance	Financial Services Professional (CFA Pathway)	University of Exeter

All three courses form part of larger open cohorts so as well as having colleagues within LGT studying alongside you, you will have access to a wider network of peers from a variety of other businesses.

The BSc Business Management is a business degree with modules in Operations, Finance, Marketing etc, but the degree has a focus on Social change with modules on CSR and sustainability. Students will also be affiliated with the Chartered Management Institute upon completion of the course.

Individuals on the BSc Digital and Technology Solutions course will spend the first two years completing core degree modules (alongside rotating across different teams in our IT department), the final two years are spent specialising in one of the following areas of their choosing: Software Engineering; Data Analysis; IT Business Analytics; IT Consultancy; or Cyber Security.

The BSc Applied Finance has been selected for our Front Office teams giving the students a strong introduction to Financial Services and Wealth/Investment Management. Individuals studying this course will also graduate with the Investment Management Certificate (IMC) and Chartered Finance Analyst (CFA) Level 1 professional qualifications as these are underpinned by the degree.

These degree apprenticeship programmes are an excellent choice if you are new to the financial services industry.

Your development

We care about your development and will ensure you gain a mixture of formal learning combined with on the job professional experience.

As an apprentice, you will spend 80% of your time at your desk supporting the work of your team. This on the job learning will provide you opportunities to develop your competencies and skills, as well as taking part in team and firm-wide training events. You will be equipped with a Buddy when you first join and have the opportunity to participate in our annual mentoring programmes from 2023.

Your additional 20% of working hours will be dedicated towards an element of learning, such as university studies or internal training. You will take part in full day academic masterclasses, lectures and will complete study leave delivered in the workplace and in your own time. As a registered student with the University of Exeter or Queen Mary University of London, you will also have full access to the university's academic resources.

Earn while you learn

Our degree apprenticeship programmes are ideal if you have decided that full-time studies at university is not the right choice for you. Your degree qualification and training costs are covered by us. This means that, unlike university, you will end up qualified and debt-free!

We offer all our apprentices a competitive starting salary of £22,000 per annum, 25 days holiday per year plus an extensive range of additional benefits that you can select from using your 15% flexible benefits pot.

We provide all our employees a one off £300 homeworking allowance that you can claim if you wish to buy equipment to create an effective homeworking set up (for example purchasing a desk, chair, screen monitors, wi-fi signal booster).

Investment20/20

You will join 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.

Degree Apprenticeship Structure

Our degree apprenticeship programmes are four years long and our first cohort start will start on the 19 September 2022. All our apprentices and graduates start on the same day to help enable you to build lasting working relationships with your peers.

You will be placed on an initial 18-month fixed term contract with the intention to offer you a permanent position with us at the mid-way stage of your degree apprenticeship, subject to your performance, conduct and commitment to your degree.

All our degree apprenticeships are based in our central London office. This is a fantastic location in London's financial hub, just next to Bank underground station and opposite the Royal Exchange.

We operate a hybrid flexible working approach, where you are able to both work in our office and from home. As an apprentice, we would expect you to spend the majority of your time working in our office working alongside your teams to ensure you receive the best possible training and networking/relationship building opportunities across our business.

Join Us

We want to continue building on our sense of belonging that truly inclusive groups of people can bring. If you want to start your career in a Firm where you can make a genuine, positive impact to the future of wealth management, we welcome you to join us.

You do not need a background in finance to apply for one of our programmes. Ultimately, we can teach what you need to know about the job and industry. In return, we need you to bring your drive, passion, and enthusiasm to make the most of the opportunity to start building your career.

"Through a shared set of values, we make sure that our Firm fits into the world in a way that is positive."
Ben Snee, CEO LGT Wealth Management

Eligibility Requirements

Our university partners have minimum expectations for their degree programme ranging from 3 B's to 3 A's. Although we usually ask you to have achieved the minimum expectations set by the universities, to be eligible for our apprenticeship programmes, 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 3 B's in the academic year 2021/22, we would still encourage you to apply.

Application & Selection Process

Please apply via the LGT Dartmouth Partners Microsite:

<https://trkr.app/campaign/2022-junior-hiring-programme-2/>

Applications will be screened via our early career's talent partner Dartmouth Partners. Successful candidates will undergo a telephone screen and virtual interview and/or assessment with Dartmouth Partners before being invited to an assessment centre with LGT. You may be given a task or exercise to prepare for ahead of the assessment day.

Any queries please contact LGT@dartmouthpartners.com

Key Regulatory Responsibilities:

Ensure compliance with the letter, spirit and expectations of applicable legal and regulatory requirements at all times (e.g. FCA, Money Laundering/Proceeds of Crime, Data Protection, Health and Safety), ensure conformance with LGT Wealth Management's best practice with regard to conduct, culture and other general business compliance control procedures.

Disclaimer:

All statements are intended only to describe the general nature and level of work being performed by staff assigned to this classification. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of staff so classified. Individuals will be required to undertake any additional tasks or duties that may be within their capabilities. LGT Wealth Management reserves the right to make amendments to the above in response to any material internal or external developments (e.g. market changes, new regulations, internal restructuring).

Candidate Privacy Notice

You can access our Candidate Privacy Notice on our Legal Notice section of our website [here](#). Select the 'Privacy Notices' section where you can download our relevant policy.

Equal Opportunities

We recognise the importance of equality, diversity and inclusion in the workplace and we strive to maintain a culture where all our people are treated equally, fairly and with respect.

We are committed to providing equal opportunities in every aspect of employment from the advertisement of jobs; recruitment and selection of candidates; training, development and promotion of employees; review of performance, pay and benefits; and the application of all policies and procedures through to the last day of employment.

Our aim is to recognise and value diversity as a strength and to foster a workplace in which people have equal opportunities to contribute and develop according to their individual merits. We have a responsibility to ensure equal opportunities for all our people and enabling them to succeed both personally and professionally. Our dedicated #included committee supports our mission to build and champion a diverse and inclusive workforce. Find out more [here](#) about our diversity and inclusion initiatives we are focusing on as a business.

Your Data

As part of the Firm's approach to embrace our inclusive culture, we are asking all applicants to anonymously provide us with their gender, age, disability, ethnicity, and social mobility data. This will be collected via our early careers talent partner, Dartmouth Partners. All information provided in this form will be treated in confidence and stored in line with the Data Protection Act 2018 and our Privacy Notices.

We encourage all applicants to inform us if they require any reasonable adjustments as they progress through the application process.

Any queries please contact LGT@dartmouthpartners.com