Portfolio Management; Degree Apprentice Programme

Job Title:	LGT Degree Apprentice
Team/Department:	US Team / Model Portfolio Service (MPS) / Central Investment Team (CIT)
Degree Apprenticeship	Financial Services Professional (CFA Pathway)
Degree Awarded	BSc Applied Finance
University	University of Exeter
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

Portfolio Management Degree Apprenticeship

This entry level degree apprenticeship is an outstanding starting point for a career in Portfolio Management. You will work primarily with the Portfolio Management team of either the US, Model Portfolio Service (MPS), or Central Investment (CIT) Teams, but will gain experience of the wider business – both LGT Wealth Management and LGT Wealth Management US - through direct interaction with the teams. 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.

You will be part of one of our Portfolio Management teams, which are responsible for the investment of all assets managed on behalf of clients of LGT. We are also responsible for communicating our investment activity and outlook to other members of the business and clients and/or their advisors.

This is an opportunity to learn about financial markets, different asset classes, investment products and how to construct diversified portfolios for private clients. You will initially be expected to provide general and administrative support to a high stand in the various teams that you work with. In time, you will be given more complex work and remit of responsibilities in line with your progression in your role.

As an LGT Degree Apprentice, you will be expected to undertake a BSc Applied Finance degree which incorporates the Investment Management Certificate (IMC) and CFA Level 1 qualifications, and progress to an Trainee Portfolio Manager within a four year timeframe subject to your completion of your degree apprenticeship and progression 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 Units

Central Investment Team (CIT)

Central Investment Team is responsible for managing discretionary client portfolios on a bespoke basis. We are involved in a broad range of activities including portfolio management, investment analysis and relationship management. Each team prides itself on the quality of service it provides the High Net Worth community ensuring that they have adopted a robust investment process to best manage the investment interests of their clients. We have developed long standing relationships with our clients and are seen by many as trusted advisors to them and their families.

The Central Investment Team provides a bespoke discretionary service in line with LGT Vestra's house views for Investment Managers and Wealth Managers. The team is responsible for managing portfolios on a day-to-day basis and assisting in the acquisition of new business. The team is fully integrated into the central research process and contribute to the various committees.

Model Portfolio Service (MPS) Team

LGT Wealth Management's Model Portfolio Team manages a number of different mandates and portfolios for financial adviser firms. The team has grown in size and scope over the past 10+ years and is now responsible for managing c.£7bn in assets. The team has strong relationships with a group of strategic partner IFA firms.

US Team

LGT Wealth Management US is a wholly owned subsidiary of LGT Wealth Management that is registered with both the Financial Conduct Authority (FCA) and Security and Exchange Commission (SEC). LGT Wealth Management US was established in recognition of the specialist services required for US connected clients and the team has an in-depth knowledge of working within the appropriate tax and legal framework. LGT Wealth Management US provides discretionary and advisory investment services to US citizens. The LGT Wealth Management US team are involved in a broad range of activities including Investments, Planning/Structuring and Relationship Management always ensuring that the output is suitable for clients with a US connection. We have developed long standing relationships with our clients and are seen by many as trusted advisors to them and their families.

Key Responsibilities:

Full training will be given

- Learn how we explore, research and create investment portfolios for clients to deliver returns over the long term.
- Learn how we adapt to developments in the market and regulatory change.
- Shadow meetings and team training events.
- Assist with the provision of analytics for the team including performance, asset allocation reports and risk reports.
- Learn how to produce various external facing documents including factsheets, investment proposals, ad-hoc reports and presentations for existing and prospective clients.
- Answer inbound queries from our stakeholders. Initially this will be from other members of LGT, but this will expand to external stakeholders (clients and intermediaries) over time. Ensure information provided is accurate, consistent and up to date.
- Provide administrative support to the Portfolio Management team.
- Ensure the administrative and organisational tasks of the team are completed accurately, efficiently and in a timely manner.
- Perform other duties as assigned

Principal Contacts

- Internal LGT colleagues
- External Custodians

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 Portfolio Management 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 B's or equivalent BTEC, 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 demonstratable experience of being able to manage and prioritise workloads/studying with a keen eye for detail
- You enjoy 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 oppositive 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