



THE TALENT SOLUTION FROM
THE INVESTMENT ASSOCIATION



Client Services Trainee - Polar Capital

Polar Capital - Company Overview

We are a leading investment management company who offer a variety of top performing funds to a wide range of clients. A number of our funds are quite specialist compared to our competitors. For example, we have funds which only invest in technology companies. We also have a commitment to being the best but not necessarily the biggest. As a result, we limit the size of our funds to give them the best chance of performing well. Our fifteen investment teams are supported by excellent marketing, administrative and operational staff. Our head office is in London where almost 190 staff are based with a further ten colleagues located in eight small offices around the world including China and the US. With a commitment to quality and performance, we have seen the assets we manage grow to over £19bn this year.

Programme information

You will join us as a Client Services Trainee as part of the Investment20/20 Trainee Programme where you will develop the key skills and knowledge required for your role. As we are a small company, you will also have exposure to other business areas, thereby gaining a breadth of industry knowledge and experience to enable you to make informed decisions about where you would like to develop your career.

Full training will be provided and you will have a primary focus on supporting our management reporting function for all client activity within the product range. Sitting within the Client Services team, you will coordinate and ensure the integrity of the client reporting produced by our external administrators and third-party partners.

As part of the Investment20/20 Programme, you will have opportunities to meet and network with over 300 trainees across the industry and participate in socials and insight events.

The traineeship is a fixed term one-year contract paying £25,000 per annum. You will receive 27 days annual leave. The role is based in London.



Responsibilities include

- Maintain and develop the Customer Relationship Manager (CRM) system to enable better client service
- Supporting data requests from the sales and investment teams
- Producing management information and internal updates on client activity
- Working closely with the administrators and Finance team on client retrocession payment
- Supporting the Client Services team with various client servicing tasks
- Ensuring all client requests and queries assigned are responded to in a timely manner
- Data preparation and production of client reporting
- Data maintenance and completion of daily dealing tasks
- Maintaining procedure documentation
- Develop an excellent understanding of the company's products.
- Maintaining a good understanding of the asset management regulatory environment

Requirements

If you are a graduate who has a strong interest in working within financial services, is results focused and able to work to deadlines with the following attributes, we are interested in hearing from you:

- This role would suit a graduate who has studied any subject but who is highly numerate
- Excellent communication and analytical skills
- Attention to detail and self-motivated desire to ensure data accuracy
- Team player, but also able to work effectively alone;
- A strong desire to learn new skills and technologies;
- Systems learning skills to rapidly understand and use appropriate systems
- Inquisitive and enjoy interpreting information and problem solving;
- Happy to get involved in variety of tasks and projects

How to apply

Applications to be sent to: applications@polarcapital.co.uk

Subject the email: Investment 20/20 – Client Services Trainee

Your application should include:

- CV
- Covering letter
- Answer the 3 questions below with 250 - 300 words per answer:



1. What are you hoping to achieve from the trainee programme?
2. What evidence can you give us that you are someone with personal drive and determination?
3. Tell us about the most interesting project or piece of work you have completed as part of your studies at either school/college or university. What did you have to do and what interested you most about it?

Successful candidates will have to undergo two interviews (in person).

Key dates

Online applications close 31 August 2022.

Start date October 2022.

Unfortunately we are unable to respond to all applications. Should you not hear back from us within one month of the closing date, please presume that the application was unsuccessful.