

# Trainee Consultant

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Edinburgh/Glasgow/London

## Investment

Firm wide responsibilities for all Trainee Consultants;

- Developing the necessary technical skills to carry out detailed and sometimes complex analysis, applying knowledge and judgement to interpret the results.
- Applying mathematical knowledge to solve often complex and challenging problems.
- Formulating advice for clients (whether the client is internal or external to the firm) using the results of the analysis.
- Presenting and communicating that advice both verbally and in a written context.
- Learning to use sophisticated modelling to help support the advice we give to our clients.
- Presenting the results of our calculations and modelling in an engaging and compelling way.
- Focusing on developing and nurturing client relationships (both internal and external).
- Responsible for careful time recording and allocation to appropriate client and job codes.
- Adhering to the firm's Information Security standards, policies and procedures.

Investment specific;

- Helping clients agree long-term objectives and targets, and devise plans for meeting those targets.
- Helping clients ascertain the appropriate level of investment risk to be taken in their scheme, to help address scheme deficits.
- Advising clients on the appropriate structure for their investment portfolio, considering the full range of asset classes and the impact of financial markets and the economy.
- Project managing implementation of a change in the structure of a client's assets.
- Carefully monitoring our clients' investment arrangements and regularly reporting to clients on progress.
- Researching investment managers/approaches/products to ensure we can advise on those that best fit our clients' needs.
- Explaining to clients how financial markets and the economy impact on different types of investment.
- Working with DC clients to ascertain the appropriate investment options for scheme members.

We're looking for candidates who love manipulating and analysing complex data and who also like to think critically to break down and evaluate problems objectively. You must also enjoy being efficient in your approach to work and deadlines, working with others, adapting to unfamiliar or changing situations, whilst all the time communicating effectively with your colleagues and clients. Difficult challenges, self-development and resilience are also areas you must relish.

