



The Private
Investment Office

Job Specification

Role

Title	Technical Manager [Wealth Planning]
Reporting Line	Head of Wealth Planning Managing Director
Regulated Function	No

Introduction

The Private Investment Office (TPIO) is a multi-family office based in Bishop's Stortford focusing on business owners and other wealthy individuals and families.

We are independent wealth advisers providing an integrated wealth management service incorporating wealth planning, tax structuring and investment management, committed to establishing strong, long-term relationships built on trust. This provides entrepreneurs and owner-managers with comprehensive and holistic advice encompassing both their private and business wealth, alongside our sister company, Fabric Business Solutions.

Our team of experienced, successful entrepreneur and finance experts, backed up by a network of specialist advisers and institutions offers clients an unrivalled range of solutions to protect and grow personal and business wealth.

Further information can be found at www.tpio.co.uk.

The group has three pillars of excellence which combine to provide a range of solutions covering Investment Management, Wealth Planning and Client Services.

This role is part of the Wealth Planning function and reports to the Head of Wealth Planning.

Duties and Responsibilities

- Work with advisers, relationship managers and when required, independently, to construct and develop wealth planning strategies for business owners and wealthy individuals and families, covering a range of complexity.
- Ensure the strategies are documented in Wealth Proposals and Recommendation Letters in a timely manner and within the company's governance and compliance framework.
- Create and maintain excellent working relationships with both internal and external stakeholders, such as clients, advisers, our client services and investment operations teams, professional connections, product providers and so on.

- Provide technical support to TPIO and group companies enhancing the service provided and enabling positive customer outcomes in relation to both FCA regulated and non-FCA regulated products and services.
- Conduct research and monitoring of solutions within the company's governance framework.
- Identify the impact of any changes in legislation and assess the impact on the group's clients, implementing the appropriate changes to the Wealth Planning Governance policy and formulating solutions for clients.

Knowledge, Skills and Experience

- A deep understanding of the fundamental aspects of wealth planning and the core best practice principles for HNW and UHNW individual and corporate clients, including a technical and practical knowledge of financial planning and complex investments, custody services and corporate solutions.
- Practical experience of more complex solutioning including estate planning strategies for UHNW families and onshore and offshore structuring for UK residents. This includes the role of special purpose vehicles, such as family investment companies, holding companies and trusts.
- Experience of in-house investment management proposition.
- Qualified to Diploma level 4 (or close to) with the desire to progress to level 6, and maybe other qualifications such as STEP, IMC and so on.

Competencies

- To work accurately and with an attention to detail.
- Be organised with the ability to prioritise and balance multiple tasks.
- Dig beneath the facts to identify key or underlying issues in complex situations.
- Ensure familiarity with the Group's compliance and risk management programmes including the accurate maintenance of CPD records.
- Ability to recommend new and innovative ways of working including the use of developing technology.
- Maintain a mature, constructive and professional presence in all circumstances.
- Becomes recognised as a credible source of information.
- Maintains and builds expertise to contribute to the success of the business, raising the team's technical skills and expertise.
- Able to foster collaborative relationships across functions and businesses to facilitate cooperation and information exchanges that improve customer and business outcomes.

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