

Private Client Investment Management Company

Platform operations

July 2021

Introduction

Saltus is a wealth management company, with a heart and soul. We are passionate about helping our clients achieve their goals in life through sharp focused investment management and expert financial planning. We have a fast moving, fast developing, dynamic and challenging culture but also one where we all feel like part of a close-knit team.

Today Saltus manages and advises on over £1.2 billion of client assets and has its headquarters in Fareham, Hampshire, with additional offices in London and Bournemouth.

We know it is our people who make the difference, which is why every team member is actively encouraged to develop and progress, with continuous training, support and regular performance reviews, you can be assured your career will always be our top priority. At every level we make sure to celebrate the successes but also learn from the mistakes together, as sharing our knowledge is what helps us to grow.

It's not all about work though... whether it is jumping out of planes or climbing mountains, for charity, or virtual cocktail nights and Friday drinks, we have something for everyone – and don't even get us started on the legendary Saltus summer and Christmas parties!

The Role

We are seeking a bright, driven individual to work within the platform operations team. The successful candidate will report to the Head of Platform Operations

Responsibilities include but are not limited to:

- Placing trades in good time (some are high value transactions)
- Booking trades in the inhouse system
- Reporting trades to administrators/custodians in good time
- ISA reporting
- Stock and cash transfers in/out
- Bulk transfer in as part of a merger
- Liaising with investment managers and custodians/administrators
- Reconciling fund positions to external counterparties
- Documenting/enhancing procedures
- Corporate action processing
- Assisting in projects

Attributes the successful candidate should possess

- New graduate or 1-2 years in Financial Services
- Educated to a minimum degree level (minimum 2:1) from a leading university
- An excellent communicator who is also down to earth and can work well in a team
- Intellectual horsepower and curiosity for solving business problems
- A 'growth mindset', i.e. an appetite for testing yourself and using past mistakes as a springboard to keep improving
- A technology native who has applied experience with Microsoft Excel but who is comfortable applying that knowledge to other systems. Some evidence of coding will be advantageous
- Good time management skills, with the ability to prioritise tasks and work to multiple deadlines, often autonomously
- The ability to form successful professional relationships both internally and externally

Remuneration

£26,000 - £30,000 depending upon experience and knowledge, generous holiday allowance and benefits (pension, Income protection, death in service and benefits platform). Relevant exam support after the successful completion of a probationary period.

