Aberdeen
8 Queen's Terrace
Aberdeen AB10 1XL

Buckingham
Investment House
22-26 Celtic Court, Ballmoor
Buckingham MK18 1RQ

Glasgow
2nd Floor
229 St Vincent Street
Glasgow G2 5QY

Leicester
MW House
1 Penman Way
Grove Park, Enderby
Leicester LE19 1SY

London
Third Floor
22 Park Street, Mayfair
London W1K 2JB

Newmarket
Cheveley House
Fordham Road
Newmarket CB8 7XN

Preston
Lanson House
Winckley Gardens
Mount Street
Preston
PR1 8RY

www.mattioliwoods.com

Mattioli Woods plc
WEALTH MANAGEMENT & EMPLOYEE BENEFITS

Aug 2016

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Financial Services

DEVELOPMENT SCHEME

*Take the **opportunity** to be **outstanding** in the field of **financial services***

GRADUATES | APPRENTICES | SCHOOL LEAVERS

INVESTORS IN PEOPLE

Are you cut out for the world of financial services?

Welcome to the world of Mattioli Woods!

We're one of the UK's leading providers of wealth management and employee benefits services. We're an AIM-listed PLC specialising in advising high-net-worth individuals, owner managers, entrepreneurs, senior professionals and other successful high earners. We now work with over 6,000 clients throughout the UK and have offices in Leicester, London, Aberdeen, Glasgow, Newmarket, Buckingham and Preston with assets under management, administration and advice in excess of £6 billion.

Acquisitions as well as organic growth continues to be our strategy, giving us economies of scale, new routes to market and an employee size of over 500. Consequently a variety of opportunities reflecting this growth are now available for those keen to be part of a successful and unique organisation.

This places us as a very diverse business in the financial services sector, where our people are dedicated to delivering the complete spectrum of services in pensions, employee benefits and wealth management, across all sectors throughout the UK.

We believe that Mattioli Woods is a great career choice for you and we hope you can join us on our journey.

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A very friendly, open and vibrant environment to work in

Working at Mattioli Woods

So this is your next step into the world of business, and here at Mattioli Woods we'll offer you a great route into financial services. We have an impressive track record of achievements and will offer our expertise, support and guidance to the most ambitious candidates out there.

We provide structured training programmes with opportunities for professional qualifications and career progression. In addition to this, we boast an enviable retention record and strong internal promotions across the Group.

You'll find we have a very friendly, open and vibrant environment to work in, home to a diverse team who will offer you a warm welcome. Throughout your career with us, we will look for ways in which to develop your skills and, as an Investors in People company, we have been recognised in providing a high level of employee well-being.

We'll offer you a competitive package, including a range of benefits covering health and well-being, finance and lifestyle choices. There's a discretionary annual bonus and annual pay reviews linked to a structured appraisal process. It's also important to us that you get the chance to share in our company's success, so we have developed an excellent Share Incentive Plan. Your development is important and professional qualifications are fully supported, including time off for study.

We hope you'll stay with us for the journey, as the vast majority of senior managers, client relationship managers and consultants joined us through our development schemes. So, jump on board to experience our different areas of work with clients and partners, as you develop the kind of proactive and personal approach that our reputation is built on.

CELEBRATING 25 YEARS

We recruit over 40 trainees per annum into our financial services scheme

Almost half our workforce has completed a qualification sponsored by the business

In the last 5 years, our employee size has doubled

London Stock Exchange Group
1000 COMPANIES TO INSPIRE BRITAIN 2015

Your career with us

A structured programme to equip you for the future

The beginning

With a combination of on-the-job training and formal technical training, you'll follow a structured programme to equip you with the training blocks necessary to undertake proficient wealth management and employee benefits administration, whilst assisting your on the job coach with their own portfolio of clients, cementing your thinking and building your experience. Early responsibility and ownership is encouraged.

Early stages

(from 4 months onwards)

Once you have completed your initial training, you'll continue to work with an on the job coach putting your technical knowledge into practice whilst building up your own portfolio of clients. You'll gain further responsibility at this stage, managing and prioritising your own workload. You can commence study for your first professional qualification from month 9.

Moving up

(from 12 months onwards)

At this point you'll be confidently managing and administering a portfolio of wealth management and employee benefits clients. Your portfolio size will increase and you'll be given more responsibility. No two days are the same as you manage your clients' requirements. You'll develop and maintain professional relationships internally and externally and sit your professional qualification exams.

What's next

(from 18 months onwards)

By this stage you'll be delivering a high standard of customer service, often dealing with complex schemes. You'll readily take ownership of problems, see them through to completion and be assigned a trainee to mentor and develop. You may also begin to take responsibility for a technical specialism, or deputise for the section manager.

Future Options

After the structured programme, you will continue to have a wealth of opportunities to progress within the Group.

The duration of the Financial Services Development Scheme will vary. Each stage may take longer for apprentices and school leavers to complete but there will be an on-the-job coach and colleagues to support you throughout!

Training and development

Training and development is a key priority for us, you'll be supported by experienced managers, colleagues and a wide network of diverse peers. We have a nurturing environment where you'll feel confident to take control of the pace and content of your progression.

On-the-job learning is only half the story. Just as important for your future are the professional qualifications for which you will go on to study – Diploma in Regulated Financial Planning. We will make sure you have all the support you need, including study material and study days before your exam.

The day to day challenges

There are so many different aspects to the job, which will keep you busy and challenged and give you a great all-round understanding of the varying aspects of wealth management and employee benefits. You are likely to cover any of the following in one day alone:

Wealth management

- Building relationships with clients and being the first point of call for your portfolio
- Supporting the consultancy team by delivering the service behind the strategy
- Overseeing the purchase of commercial property and arranging secured loanback facilities
- Facilitating the purchase of investment products
- Preparing sophisticated trust documentation with ongoing administration
- Managing day-to-day liquidity of pension scheme bank accounts
- Calculating pension benefits, including the facilitation of payments
- Calculating and presenting portfolio valuation information

Employee benefits

- Supporting the consultancy team
- Building relationships with clients
- Attending client meetings in support of the consultants
- Managing company pension arrangements
- Fielding general queries from employees of corporate clients
- Liaising with the pension providers and the providers of the various risk benefits
- Undertaking annual reviews for benefits such as Group Life Assurance and Income Protection
- Supporting our own flexible benefits proposition

Future options

Once you have completed the development scheme, you will have a number of opportunities available to you. You may wish to stay within client relationship management and take a more senior role, management responsibilities or a specialism which could be property, investments or another technical area.

Outside this, for those who would like to develop face-to-face client relationship management and progress with an advisory role, opportunities also exist in any of the operational departments of the Group, including wealth management and employee benefits consultancy. For those considering this route, this will involve a full training programme together with necessary qualifications for this role.

1 Our people - meet some of the team

We are one of the biggest graduate recruiters in Leicester but we also work hard to develop school leavers and apprentices too and have a robust ongoing recruitment strategy. Let some of our team members who came through those channels tell you about their experience for themselves.

School leaver

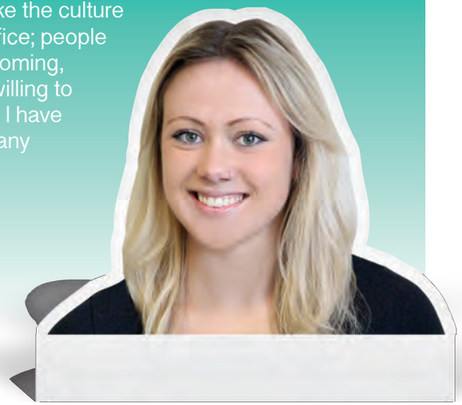
Kimberley Smith

Client Relationship Manager - Employee Benefits

I really enjoy my job as a client relationship manager as each day is different and I am constantly increasing my knowledge and understanding of the role. I can be working on anything from flexible benefits to insurance, healthcare and pensions. I enjoy the technical aspects of the job and get a lot of support and guidance from other colleagues.

Mattioli Woods is a rapidly growing company, with the career opportunities to match and I would like to work towards becoming a junior consultant in the future.

I really like the culture in the office; people are welcoming, always willing to help and I have made many friends.



Apprentice

Adam Welborn

Client Relationship Manager - Wealth Management

I joined Mattioli Woods after completing my A-Levels and wanted to differentiate from the crowd by bypassing the university route and trying something which gave me real world experience.

The development scheme has provided me the on-the-job training in which I have learnt in-depth knowledge of how the pensions and wealth management industry works and I have not been treated any differently to a graduate trainee. My day is varied and can consist of placing investments for clients or calculating benefits for property purchases.

Mattioli Woods has given me a great opportunity to learn and a clear career progression path to follow.

Graduate

Amit Joshi

Consultant

Being a consultant gives me the chance to meet with clients from a multitude of industries that are in different stages of their career and personal wealth.

As well as my everyday meetings, I have visited almost every major UK city for our seminars where I have presented technical updates to accountants and solicitors. In addition to this I am pleased to say that I have completed the Diploma in Financial Planning with the support of the company.
The best thing about Mattioli Woods is the family culture, which really makes it enjoyable coming into work!

Social scene

We are proud to say that we have a strong culture in and out of work. Throughout the year, our staff are involved in a number of charity events – ranging from highland challenges to marathons, skydives, cycling races and cake sales.
In addition to this, we have an active social scene with sporting events, fun days and a variety of nights out.

We believe **diversity** is our **strength**, and we therefore don't look for a **particular 'type'** of person

About you

We believe diversity is our strength and we therefore don't look for a particular 'type' of person; often your motivations and aspirations are more important than experience. However, you do need excellent communication skills, problem solving ability and a drive to succeed. Here are some of the attributes we're looking for:

- First class approach to client service with outstanding communication skills
- Commercial and economic awareness
- Energetic, passionate and proactive
- Open and honest learning and sharing mentality
- Infinite attention to detail
- Ability to think on your feet
- Willingness to adapt and embrace change
- Personal pride and ownership

Open events

We run our own regular open events. Our open events give you the opportunity to find out about our ever-growing business and understand what a career here would be like, through presentations from the senior team, and other graduates and apprentices who have been through the programme.

How to apply

Our recruitment process is ongoing and we accept applications all year round. If you're successful with your application, we'll invite you to an assessment day for the next intake.

You can visit our website **www.mattioliwoods.com** where you can download an online application form. Alternatively, please email us at **recruitment@mattioliwoods.com** or telephone **0116 240 8700** and we'll be pleased to help!

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