

Wealth Operations Apprentice

Edinburgh

Salary: £22,000

[Careers \(myworkdayjobs.com\)](#)

We are looking for a highly motivated apprentice who is interested in working in Wealth Management, helping give everyone more confidence in putting their money to work.

This is an exciting opportunity to join one of the top UK Wealth Managers and be part of it's evolution and transformation. You will be part of an exciting period of change and learn how we work to meet the needs of our customers across a number of departments while developing your own skills and knowledge.

During this apprenticeship you will have the opportunity to gain experience in customer services, change management, business architecture and design. Upon completing the programme you will understand how those areas work together to deliver for customers, shareholders and the wider community. You will learn how the regulatory regime keeps customers safe, how to service customer needs and how we can innovate for future opportunities.

Key Responsibilities for this role:

Your daily activities may include the following, but there is potential for growth outside of this:

- Speaking with our advisers, on phone or via message, to help them with their queries.
- Speaking with financial advisers to help service their client accounts.
- Helping research, document and plan initiatives to improve our business.
- Keeping accurate records and notes of work or actions carried out.
- Attending meetings and collaborating with colleagues.
- Writing documents, letters or emails.
- Engaging with colleagues to deliver solutions, develop new ideas or resolve issues.
- Taking ownership of work, issues or queries and seeing the through to completion.
- Finding out who around you can help, and how you can help them.
- Explaining complex ideas in a simple way that inspires action.
- Identifying your own development needs with the support of your manager and taking action to address them.

Key Knowledge, Skills & Experience:

- Good and confident communication skills, both written and verbal
- High level of accuracy and good attention to detail
- Strong analytical skills in order to identify key themes and suggest solutions
- Structured approach to work and very well organised
- Ability to quickly learn and assimilate key processes and procedures
- Moderate understanding of the MS Office (Word, Excel, PowerPoint). Experience in Excel is preferred.
- A proactive team player who is confident about working with others but also independently and can promptly escalate any issue and work remotely where required

Qualification Required

As a minimum, candidate will have 5 National 5s or 2 Highers with grades in Maths and English grades (A-C).

This is a fixed term contract for 18 months upon which the business may decide to retain, subject to the Apprentice performance, headcount, and available funding. If recruited into a permanent role, the individual will follow the career progression applicable to the specific role/department.

Future Prospects:

Upon completion of the apprenticeship, there may be opportunities for career progression within our Wealth Management team or other relevant departments based on performance, business needs, and available opportunities. If recruited into a permanent role, the individual will follow the career progression applicable to the specific role/department.

Training Provided:

As a Wealth Advice Apprentice with M&G, you will undertake the Providing Financial Advice SCQF Level 6. The apprenticeship will be delivered through a blend of live online learning, pre-recorded lectures, and face to face inductions and masterclasses.

We may seek to close vacancies early if we receive a high level of applications. Please do apply early. We have a diverse workforce and an inclusive culture at M&G plc, underpinned by our policies and our employee-led networks who provide networking opportunities, advice and support for the diverse communities our colleagues represent. Regardless of gender, ethnicity, age, sexual orientation, nationality or disability we are looking to attract, promote and retain exceptional people. We also welcome those who take part in military service and those returning from career breaks.

If you are interested, apply [here](#)

Take a look at our Apprentice short film to learn about their experiences [here](#)

Closing date for applications 29th April 2024.

apprenticeship@mandg.com