

Role Profile: Wealth Consultant

Role Title	Wealth Consultant
Reporting Into	Lead Consultant
Role Banding	Four
Summary	Responsible for the delivery of consultancy services to Simplify clients. Role encompasses providing change delivery capability to client engagements. The role holder will be an experienced consultant capable of working across change disciplines and playing a key role in all elements of the consulting value chain.

Responsibilities

- Provide change delivery capability (inc. business analysis, project management and testing) to client engagements.
- Support and lead consultancy engagements with Simplify clients, providing change delivery capabilities. This will include, but not be limited to plan definition, tracking and reporting.
- Work closely with client stakeholders to assure engagement delivery and influence decision making to achieve the desired outcomes.
- Work with other members of the Simplify team to meet the delivery objectives and bring a tenacious delivery mentality to the engagement.
- Work on internal initiatives bringing project rigour and experience to progressing activities that enhance the Simplify proposition.
- Provide thought leadership and insight based on your knowledge of wealth technology, products and process.
- Support Simplify's corporate social responsibility commitments, including charity fund raising activities.

Values & Behaviours

- It is expected that all employees of Simplify Consulting adhere to the cultural values of tenacious delivery, professionalism and commitment, while maintaining their integrity, leading by example and working as part of the Simplify Team.
- To display the behaviours of a consultant – to be insightful, take the lead in meetings, to be confident, knowledgeable and challenging.

Experience

- Experienced change professional with success in delivering complex initiatives within wealth businesses with a background in project delivery/business analysis or similar.
- Deep understanding of delivery methodologies (Waterfall, Agile etc.) and how and when to apply them.
- Wealth industry knowledge-including technology, products and processes.
- Minimum 5 years experience of working in change management/business analysis within the wealth industry.
- Proven track record of delivering complex change initiatives into wealth businesses.

Qualifications

- Degree educated (Desirable)
- Change Qualification (Desirable)
- Investment Qualification (Desirable)

Package

- Competitive remuneration package
- Generous employer pension contribution
- Flexible working opportunity
- Commitment to professional development