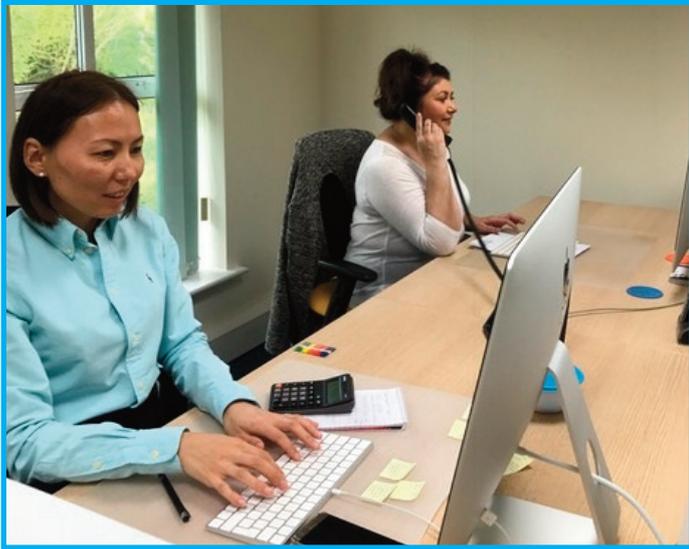


Wealth and Tax Management – recruiting on attitude then teaching skills



For financial planning business, Wealth and Tax Management, the younger generation have a key role to play in supporting the growth of the core business and its diversification in to fund management and virtual advice. Recognising that students and graduates are not the 'finished product', the business looks for those with the right attitude and proactively seeks to develop their skills, knowledge and understanding.

Internships

In the space of just three years, Wealth and Tax Management have taken on six young people. Initially working with the University of Northampton, the business took on three interns, each of whom became full time employees following their graduation.

Following an introduction at the SME Buckinghamshire Business Awards in 2017, at which the company secured first place in the e-business and second place in the innovation award, Wealth and Tax Management established a relationship with the University of Buckingham.

Through the University of Buckingham's internship scheme, backed by Santander, a further three interns have started with the business. One has already moved from marketing intern to full time marketing assistant with the business. The other two interns are supporting the associated company, Minerva Money Management, with preparations for the launch of their first ever fund, the CCM Intelligent Wealth Fund. Going forward, it is hoped that the interns will become permanent employees, supporting the fund and financial management.

"Through the internship schemes, we have been able to find a number of talented and motivated employees. Over three years, we have had six student interns and I've been impressed with them all. To me, attitude is the key to recruitment; young people are not the finished article, but if they have the right attitude then we can teach them the skills they need. I have found young people to be talented, hard-working and quick to learn. They are mature, with a good attitude and good with technology. Every business needs employees such as these."

Tony Byrne, Managing Director

For more information contact:
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Wealth & Tax Management
Designing your future





Chloe Goodman
(Previous marketing intern
now employed marketing
assistant)

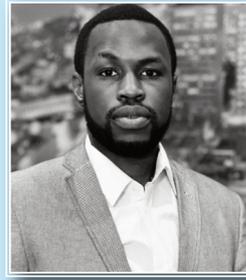
Prior to beginning her internship, Chloe combined studying for a Business and Management degree with a

part-time job at a golf club.

"I was unsure of what I wanted to do after my degree and had no particular career path in mind, which although left me confused on what to do next, also opened many doors for me. I chose to look at internships as I thought it would give me an insight into a career in marketing without throwing myself straight into a full-time job I wasn't sure about.

Through the internship, I have gained confidence in myself and my capabilities in the work environment. I have been allowed to work independently and learn how to do new things such as using new programs and software's, but also coherently work alongside fellow employees and help them with their work too.

The best thing about my internship is that I have enjoyed doing certain tasks that I never thought I would enjoy or even be good at. I have discovered new ways of advertising and using social media, whilst using analytics to track clients behaviour which is very interesting. Starting as an intern, to becoming an employee has meant I have gained more responsibilities which definitely motivates me to work harder and come up with new ideas to market the business."



Tayo Omotosho
(Intern)

Currently a student at the University of Buckingham and working as a freelance graphic designer, Tayo decided on the internship following an introduction to Tony at a university job fair:

"I found Tony's explanation of the company's function within the financial industry extensive and witty. He also explained where he intended to take his business in the coming years and I was intrigued.

Through the internship I have gained hands on experience within the financial industry, and an understanding of the skills and knowledge from my economics degree that will be useful for both myself and within the workplace. I have particularly enjoyed working on an annual market summary presentation and gaining an understanding of the qualifications needed to become a Chartered Financial Planner."



Jonathan Ravichandran
(Intern)

Currently an accounting student at the University of Buckingham, Jonathan found out about the internship through the University's careers advisor:

"I chose an internship to broaden my understanding within the financial industry and to have an opportunity to put into practice previous skillsets that I had learned at university. Through the internship I have gained an overall familiarity of what goes on in a wealth management business as well as obtaining an understanding of imperative software such as Parmenion. The best things about the internship are being part of a pleasant work environment and also being able to work with tools that are important within this industry. I truly believe that the knowledge I have gained will be beneficial to me in the future."

Workforce Development

For Wealth and Tax Management, knowledge is seen as key to improving how people perform their roles.

Continuous improvement of knowledge is seen as imperative and as such, employees are encouraged to utilise learning opportunities. This can take the form of self-learning, distance learning, attendance at external courses and on-the-job training. Employees are also required to complete the Chartered Financial Planner qualification, with the course and examination fees covered by the business. This is the highest level of qualification available to professionals in the sector and exceeds the minimum standards expected.

Supporting the development of their employees is also a means through which the business can attract, and retain, a skilled workforce. Whilst the business may not always be able to compete with the likes of London businesses, it can offer benefits that others may not and the availability of training is a definite reason to stay. When an employee does leave, it is not a reflection on the business; it is more testament to the business' success in developing their employees.

This approach brings benefits for the employees too. Within the business, they have the opportunity to develop and progress as much as they wish to.

The Future – Knowledge Transfer Partnerships

Keen to embrace technological change and remain innovative, a separate company, Intelligent Wealth, has been formed. The company is looking to create an advanced method of advice delivery via machine learning. Already there are examples of online digital/robo advice, but the business is looking to improve on this, through more interactive advice, that resembles speaking to a person.

Young people will be playing an important role in the development of this new business too. Through Knowledge Transfer Partnerships, the business will be working with the University of Buckingham to both employ a graduate and utilise the research expertise of the University, at a subsidised cost.

And this ongoing commitment to developing young talent continues to bring success, with Wealth and Tax Management announced as MK Business of the Year at the recent Buckinghamshire SME Awards 2018.