

McInroy & Wood (“MW”) is a leading independent private client investment management firm, with a successful track record of investing directly across developed and emerging markets for nearly 40 years. The firm currently manages client assets of circa £2bn. MW is headquartered in Haddington, East Lothian, where the majority of its staff are based, with integrated teams in London and Harrogate.

Independence, with a controlling family interest, ensures a consistency of approach and stability, that is valued by staff and clients alike. MW has consistently delivered sustainable organic growth and is seeking to enlarge its Harrogate based team to underpin future growth plans. Building a diverse team is a priority, recognising the benefits this brings both to clients and colleagues.

The role

The role involves team co-ordination, event planning and wider personal assistant tasks to help ensure the smooth running of the Harrogate office. This includes dealing with director and staff administration requests in a timely and accurate manner, and ensuring all enquiries are dealt with politely and professionally. The role offers the opportunity to play a crucial part in supporting the future growth of the regional business as part of the wider success of the firm.

Responsibilities

- Assisting the Harrogate team to provide a high level of service to existing and prospective clients by supporting the team and clients’ needs, liaising with the Client Administration team to handle enquiries, resolving any issues promptly and facilitating the smooth running of the office.
- Co-ordinating meetings and diaries for the team both internally and externally, communicating effectively internally across departments and the three offices.
- Assisting with the preparation of materials including reports, presentations, and event invitations for clients, professionals, and other business development initiatives.
- Liaising internally to ensure events and materials are logged and run in line with FCA/GDPR procedures.
- Assisting with various business development initiatives and ad hoc projects, including organising existing and prospective clients’ meetings as well as rolling schedule of event co-ordination.
- Organising business travel for the Harrogate team – Investment Director and Investment Manager.
- Providing remote support to the London team, as required during holiday periods.
- The role presents an exciting opportunity to assume wide ranging responsibilities to assist the team to deliver high levels of client service and support the ambitious long term growth plans of this dynamic and well-respected firm.
- The role is part time and will be based at our Harrogate office, working closely with the existing Investment Director and Investment Manager based there. Flexible working patterns and the option to work from home when appropriate will be considered but the individual is expected to be predominantly office based, 5 mornings a week. The role will involve some travel to the Haddington and London offices for meetings with colleagues and elsewhere in the North of England for business development purposes.
- The role may occasionally require work outside standard business hours, including evenings, to meet business needs.

Skills & expertise required

- The highest levels of integrity and a true commitment to client service are a necessity.
- Effective communication and strong interpersonal skills, and an ability to work both independently and collaboratively as part of a team.
- Excellent attention to detail and ability to work to a high degree of accuracy.
- Strong organisational skills and the ability to meet deadlines and manage multiple tasks.
- Well presented with a confident, friendly, and approachable manner.
- Initiative, energy, and resourcefulness are characteristics all employees are expected to demonstrate.
- Proficient with Microsoft applications such as Outlook Email and Calendar, Teams, Word, including mail merges. A basic knowledge of Excel would be desirable.

Software and CRM

Previous experience with technology and software is essential as the role will involve maintaining our contacts database and using our CRM workflow system.

Previous experience of working in a dynamic team and marketing is desirable. Experience in the financial services sector is not essential, and training will be provided including the opportunity to study for the Investment Administration Qualification.

What we offer

Salary:	Competitive and subject to experience.
Holidays:	25 days per year, increases to 30 days dependent upon time spent with Company. Additional holiday in the year following milestone anniversaries (10 years and every 5 years thereafter). Holiday is pro-rated for employees on part-time contracts.
Pension:	Group personal pension scheme, defined contribution. Company contributes 7% of salary pa (employee contribution of at least 2%). We offer a pension salary exchange arrangement to all active scheme members.
Health:	Private healthcare insurance.
Life Assurance:	4 x Death in Service.
Workplace:	A friendly, supportive environment in bright and modern office premises.
Hybrid Working:	Option to work remotely for up to two days per week, subject to approval once initial probationary period has been completed. Company provides necessary equipment to support effective home working.
Social Commitment:	Opportunity for paid leave for volunteering purposes.
Study Package:	Support available for professional growth and development.

For an able and ambitious candidate, McInroy & Wood offers significant career opportunities as the firm continues to grow and develop.

If you are interested in applying, please email: louise.sparkes@unityresourcing.co.uk with a short video to introduce yourself outlining what you can bring to the role, along with your CV and a covering letter of no more than 500 words, explaining why you wish to pursue a career with McInroy & Wood.