Castlegate Financial Management Limited

Job Description - Managing Director

We’re looking for an experienced, visionary leader to join our team as Managing Director, leading the charge in shaping the future and continued growth of Castlegate Financial Management as part of the wider Duncan & Toplis Group.

Castlegate is a trusted wealth management company with an impressive, and proven track record of success. With a diverse portfolio of clients and a team of dedicated professionals, we are poised for continued growth and expansion.

With a high performing and successful team already in place, as a seasoned leader you will bring your proven experience, passion for excellence and a drive to make a difference.

You will be a leader, with proven success in the wealth management industry, you will develop and implement strategic plans that drive business growth, profitability, and market share. As a confident and effective communicator, you will be passionate about people development, identifying areas for the team to strengthen and grow. You will have an excellent track record of building relationships and identifying innovative solutions that are attractive to the market.

**Key Responsibilities**

We are now seeking a dynamic and experienced Managing Director to lead our wealth management team and drive the strategic growth of our financial planning services, both within the Duncan & Toplis group and across our core markets. The Managing Director will be responsible for overseeing all aspects of the operations within Castlegate, including client and portfolio development, financial performance, and team leadership.

**Client Relationship Management**

* Cultivate and maintain strong relationships with clients, ensuring that service levels meet both company and client expectations.
* Develop and implement sales strategies to attract new clients and identify growth opportunities with existing clients.
* Cultivate and manage relationships with existing and new providers to ensure our clients have the best possible terms and service.

**Strategy and Leadership**

* Actively participate in the Group Operations Board to develop, guide, and achieve our Growing Together strategy.
* Identify, evaluate, and inform the Group Operations Board about internal and external issues and implement strategies to address these issues.
* Develop and manage the service line leadership team, ensuring that objectives are met in all areas.
* Attend events and act as spokesperson for your service line.
* Promote strong relationships across the Duncan & Toplis group and with the Kreston Global network.

**Operational Planning and Management**

* Foster a culture that aligns with our group purpose, vision and values: Trust, Inclusivity and Partnership.
* Oversee the efficient and effective day-to-day operations.
* Ensure that all operations meet with or exceed expectations.
* Work with the group CFO to prepare annual financial budgets.
* Mentor, develop, and manage the performance of team members, setting clear goals and objectives and providing regular support and feedback.
* Overseeing client relationship management.
* Provide monthly reports to the financial planning team and the Group Operations Board.

*In addition, here are the attributes we are looking for:*

**Leadership –** you can guide, motivate, and influence a team or organisation to achieve common goals and objectives. It involves setting a vision, providing direction, making informed decisions, and inspiring others to perform at their best.

**Strong Communicator –** you are effective in conveying information, ideas, and messages to others in a clear, concise, and engaging manner. This includes both verbal and written communication skills, as well as the ability to listen actively and understand the needs of thew team or clients.

**Ownership –** you have a sense of responsibility, accountability, and commitment that employees or team members have towards their tasks, projects, or goals. It means taking initiative, being fully engaged, and taking pride in one's work, as if you were the owner of the project or task.

**Delivery Focused –** you prioritise and emphasise the timely and successful completion of tasks, projects, or goals. It implies that someone is committed to achieving results and meeting deadlines, often with an emphasis on efficiency and effectiveness.

**Adaptable –** you can adjust to new or changing situations, tasks, and environments. It involves being open to learning, flexible in your approach, and capable of handling unexpected challenges and responsibilities.

**Qualifications:**

* Proven track record of success in senior leadership roles, focused on engagement leadership emotional intelligence and motivating and guiding others.
* Strong business acumen and strategic thinking skills, with the ability to develop and execute effective growth strategies, provide strategic insights and direction for the company to move in.
* Exceptional interpersonal and communication skills, with the ability to build rapport and trust with stakeholders, colleagues, and clients.
* Deep knowledge of financial markets, investment products, and wealth management practices, with extensive and proven industry experience.
* Demonstrated leadership capabilities, with a track record of inspiring and motivating teams to achieve exceptional results.
* Professional certifications such as the Diploma in Regulated Financial Planning or the Advanced Diploma in Regulated Financial Planning or equivalent are highly desirable.
* Full UK Driving licence

Join us and shape the future of wealth management and financial planning services for the Duncan & Toplis Group.

Please apply with your CV, and a covering letter summarising your skills, experience and why you are interested in this position.