

Tilney Smith & Williamson

For over a century, Tilney Smith & Williamson has provided tailored financial and professional services to private clients and their business interests. Today, the firm is one of the largest independently owned investment managers in the UK in addition to being the country's eighth largest accounting firm. Its 1,700 staff serve clients including individuals, families, entrepreneurs, charities, trustees, professional advisers and businesses from 13 offices in the UK, Ireland and Jersey.

London

Our London office, based in the City, provides leading edge advice to private clients, professional practices, mid to large corporates and nonprofit organisations .

From the London office we provide the full range of our services: business advisory services, banking, corporate finance, corporate recovery, corporate tax, forensic services and litigation support, investment management, pensions and financial planning and advice on personal tax and trusts.

Valuations

The valuation team prepares a wide range of valuations for accounting, tax and commercial purposes, in both contentious and non-contentious circumstances. In addition to business and share valuations, we also prepare valuations of intangible assets (often post acquisition) and incentive scheme awards (e.g. share options and management share plans).

We are part of a broader transaction services team and sit alongside due diligence and financial modelling colleagues. The team is currently small but ambitious, giving the applicant an exciting opportunity with excellent career prospects.

Job Description**Purpose of Role:**

We are looking for a bright, motivated individual to join the team, to take responsibility for the analysis, execution and reporting involved in the valuation of shares, companies and other financial instruments. The role involves managing people and clients and also responsibility for assisting with business development.

This demanding role will allow exposure to a wide variety of clients, sectors and type of work, which will be highly rewarding to an individual who enjoys working on diverse projects and the personal dynamic of working as part of a small team.

Reports to - Partner/Director

Key responsibilities:

Client (valuation) work:

- establishing and communicating work scopes
- planning and preparation of budgets
- performing/supervising work
- writing/reviewing reports
- responsibility for client meetings
- building valuation models

- researching industry trends, comparable companies and acquisitions

Marketing:

- networking and maintaining industry contacts
- maintenance of team credentials database
- assistance in preparing for work pitches

Supervision, development, appraisal of staff - as required when junior staff are utilised

Cross-selling and liaison with other departments:

- working alongside colleagues from other departments
- maintaining cross-divisional contacts

Key Competencies:

1. Judgement (both in terms of scope, depth of work done and evaluation of results) - critical, given the open-ended nature of this work.
2. Commercial awareness - an integral part of the role. In addition, an ability to pick apart company accounts and analyse them in detail.
3. Communication - both excellent oral and written communication skills are integral in providing client service. Our report is in many cases the only permanent record of our work received by our clients.
4. Planning and organisational skills - effective organisation of work and balancing work volumes across a portfolio of clients. Client management skills are also essential to provide exceptional client service efficiently at acceptable recovery rates.
5. Creativity and innovation - essential to distinguish us from a crowded, high quality and able field and to consider and resolve complex issues as these arise.

Candidate Profile**Education/Qualifications :**

- Educated to degree level or equivalent.
- Completion or working towards a relevant professional qualification e.g. CFA or Chartered Accountant (ACA/CA/ACCA) .

Key Experience/Skills:

- Significant experience of business valuations gained within a leading advisory firm with international coverage and clients.
- Extensive experience of valuation methodologies and modelling and first-class valuation technical skills. History of providing these in a range of sectors and for a number of uses, including for accounting and commercial purposes such as share options, derivatives and growth shares.
- Up-to-date working knowledge of key valuation methodologies and best practice modelling.
- Experience of managing a team of junior valuers.
- Excel, Word and PowerPoint skills - in the creation of our valuation models and in preparing relevant reports, a high competency in these formats is vital to provide a robust and creative output. Experience in business development and willingness to develop these skills.
- An ability to generate contacts within the industry and a willingness to develop such contacts.
- Fluency in business English - both written and oral.

About Tilney Smith and Williamson

Tilney Smith & Williamson is the UK's leading integrated wealth management and professional services group, created by the merger of Tilney and Smith & Williamson on 1 September 2020. With £54.8 billion of assets under management (as of 30 June 2021), it ranks as the third largest UK wealth manager measured by revenues and the eighth largest professional services firm ranked by fee income. The Group currently operates through three principal brands: Tilney, Smith & Williamson, and online investment service Bestinvest. It has a network of 28 offices across the UK, as well as the Republic of Ireland and the Channel Islands. Through its operating companies, the Group offers an extensive range of financial and professional services to individuals, family trusts, professional intermediaries, charities, and businesses.

Value statement

Tilney Smith & Williamson's chosen purpose to "place the power of good advice into more hands" succinctly encapsulates the group's central mission of supporting both individuals and businesses to achieve their goals.

In delivering its purpose, Tilney Smith & Williamson have set out three core values that it is committed to embedding in the culture of the business:

- **Personal – we treat you as an individual:** We are a people business at heart and strive to deliver a friendly, inclusive, and personalised service to all of our clients, large and small.
- **Partnership – we go further together:** We develop relationships that stand the test of time, spanning multiple generations. We partner across the full breadth of our expertise to create value for our clients, our company and society at large.
- **Performance – we strive for more:** We are ambitious for our clients and for ourselves, so we aim to be a forward-thinking and innovative business that leads the way in the industry.

Diversity statement

The Tilney Smith & Williamson Group recognises the benefits of a diverse workforce and is committed to treating all colleagues with dignity and respect regardless of race, gender, disability, age, sexual orientation, religion, or belief. At Tilney Smith & Williamson we are committed to equal opportunities in all aspects of our work.