

# BECOMING A CO-OWNER

## Client Manager/ Assistant Client Manager



## About Castlefield

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We are The Thoughtful Investor®. We are chartered investment managers and financial advisers and we offer a values-based investment approach from the perspective of being values-based ourselves.

When Castlefield was established in 2002, the intention was always to make it a force for good. Castlefield acts for individuals and organisations that seek an outcome where business is recognised within the framework of its impact on people and planet.

We exist to help clients and our co-owners to achieve their personal goals whilst promoting and supporting the welfare of the widest community of stakeholders. In corporate social responsibility (CSR) terms it means that we believe that it's just as important how we earn money as the way in which it's ultimately distributed.

## Client Management Team

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The client management team at Castlefield is at the heart of building, maintaining and developing positive relationships with all our clients. Its members act as the primary point of contact with the firm, overseeing the entire client lifecycle from initial outreach to ongoing service delivery and anytime in between.

We are looking to build the capacity of the team and are now looking for an additional experienced or aspiring Client Manager.

## Role

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**Job title:**  
Client Manager/  
Assistant Client Manager

**Team:**  
Client Management

**Location:**  
Manchester / Hybrid

**Salary:**  
up to £35,000

**Do you want to build meaningful relationships and help clients to make a positive impact with their investments?**

The Assistant /Client Manager's role is to provide an excellent service to the Castlefield clients assigned to their role. A successful Assistant / Client Manager will work closely with other members of the team and with our Client Advisers to build and maintain strong relationships with the existing and new clients.

## In This Role You Will:

- **Build strong relationships:** Be a trusted point of contact for our clients, ensuring they receive exceptional service and support throughout their investment journey.
- **Identify opportunities:** Proactively understand client needs and goals, identifying potential investment opportunities aligned with their values.
- **Improve your investment knowledge:** Be confident in explaining quite complicated investment approaches and investment markets to clients with different levels of knowledge and understanding.
- **Contribute to our advice process:** Collaborate with the Client Advice team to develop and implement personalised financial strategies that meet each client's unique circumstances.
- **Champion our values:** Represent Castlefield with integrity and professionalism, upholding our commitment to responsible and sustainable investing practices.



## Your Profile

We are looking for someone who:

- **Thrives in building relationships:** You possess excellent communication skills and a genuine desire to connect with people on a personal level.
- **Shares our values:** You believe in the power of aligning investments with personal values and are keen to make a positive impact.
- **Demonstrates initiative:** You're proactive, resourceful, and eager to take ownership of your responsibilities.
- **Is a team player:** You collaborate effectively with colleagues and share a commitment to achieving common goals.
- **Embraces continuous learning:** You're committed to staying up-to-date on industry trends and regulations.

**This is a full-time, hybrid role offering competitive compensation and benefits. If you're ready to make a difference and join a team that shares your values, we encourage you to apply.**

### Additional Information:

- Level 4 qualification (or working towards) in financial services, with some focus on investment markets is desirable.
- Strong understanding of the FCA Conduct Rules essential.

We are committed to providing equal opportunities to all current and prospective co-owners. We aspire to have a diverse workforce because, in our view, diversity enables better business outcomes. We also believe that a more inclusive workplace, where people of different backgrounds work together, ensures better outcomes for all.

From application to interview, we place inclusion at the heart of all we do.

For these reasons we strongly encourage suitably qualified applicants from a wide range of backgrounds.

## Life at Castlefield

We're a profit seeking business, which exists to help clients and co-owners to achieve their personal goals, whilst promoting and supporting the welfare of the widest community of stakeholders.

In a CSR context, we believe that it's just as important how we earn the money, as the way in which it's ultimately distributed

### Our Purpose:

**"We gather assets  
to do good."**

### Our values:

#### Creating a sustainable business:

We act to support and protect the future of our business

#### Ownership:

We act like business owners because we are business owners

#### Responsibility:

We value the role each of us plays

#### Empowerment:

We have the power and freedom to make our business better

#### DIVERSITY



We believe that when everyone feels valued and included, you do the best work of your life. We invite every co-owner to get involved with creating a workplace where everyone feels that they truly belong.

#### WORKING WITH COMMUNITY



We are active members of Manchester community - through championing the good work standards to engaging with local initiatives.

#### GIVING BACK



We run the Castlefield Charitable Fund that provides important grassroots funding to the charities in the North West. We fundraise and raise awareness along the way!

#### COMMITTED TO SUSTAINABILITY



We exist to make a difference! From the coffee we drink through to the furniture we use - sustainability is at the core of all we do. We also aim to get to Net Zero by 2030.

## Employee Ownership

By becoming a Castlefield employee you are becoming a co-owner, so it's not just about having a job and turning up, it's more than that. You're encouraged to think and act like a business owner and are empowered to do so!

Being an employee-owned business means that all our employees have a share in our success. It involves taking responsibility and pledging the commitment to be involved and in turn having a right to be informed and be heard.

Being a co-owner means that co-owners are asked about some pretty important choices shaping the direction the business is going to embark on. It is not a small ask and we provide support, additional information and coaching for co-owners before they decide.

## How To Apply

You might have realised that values alignment is very important for us. Getting to know why you want to work for us and which value resonates with you most is a first step we do when looking at applications.

So please do let us know why you feel Castlefield is your next destination, by submitting your cover letter to us. You might want to also attach your CV too.

[Please click here to submit your application.](#)

For enquiries and clarification, reach out to [careers@castlefield.com](mailto:careers@castlefield.com)


**Address:**

111 Piccadilly, Manchester, M1 2HY


**Website:**

[www.castlefield.com](http://www.castlefield.com)


**Phone:**

0161 233 4890

## What We Can Offer



**Hybrid and flexible working opportunities**



**Positive and friendly place of work**



**Child and dependent leave**



**Long-Term Recognition Initiative**



**Opportunity to build up direct shareholding in the business**



**Fair and competitive salary**



**Contributory pension**



**25 days of holidays (increasing to 30) plus Bank Holidays**



**Membership of Chartered Institute of Security and Investments**



**Enhanced Maternity and Birth Leave**



**Employee Assistance Programme**



**NHS Top Up scheme**



**Development via Castlefield Academy**

