

# INVESTMENT, FINANCIAL , ACCOUNTING & LEGAL Recruitment

**Expertise, Engagement, Value**

EXPECTATIONS EXCEEDED | ASPIRATIONS ASSURED



“We put people  
before sales,

We are an independent recruitment company dedicated to asset management, accounting & finance, asset servicing, legal and the wider financial services sector in Scotland.

A specialist recruiter, our expertise extends across permanent, interim, temporary and contract positions, as well as pre-employment vetting and on-boarding services.

Working in close partnership with clients to tailor the most effective recruitment strategies, we have the resources to target exceptional candidates and match them to roles that encourage them to excel.

To do so, we put people before profit, service before sales and ethics above all.



# “Before profits, service and ethics above all.”

Betsy Jane Williamson, Managing Director

Core-Asset Consulting was created in 2005. Our ambition was to build a recruitment company that offers clients and candidates the highest levels of expertise, engagement and value.

Initially we made our reputation within Scotland's asset management sector. But the success of our model has allowed us to expand rapidly.

We have developed into the wider financial services market, built an accounting and finance team, established an interim, temporary and contract division, launched a vetting and on-boarding service, and expanded into the legal sector.

We offer a compelling mix of high market expertise and high client and candidate engagement, built on the strong foundations of a recruitment model unique to Scotland.

As a result, Core-Asset Consulting is now considered by many companies to be their number one recruitment partner.



## The highest levels of expertise

On-site recruiters will have deep knowledge of one organisation. A traditional agency can provide breadth of knowledge across many sectors. Core-Asset Consulting offers both.

We are multi-disciplinary experts within our industry sectors of asset management, accounting & finance, asset servicing, legal and the wider financial services sector in Scotland.

As an example, our asset servicing consultants work across the full range of investment operations roles in their respective salary bands.

Our multi-disciplinary approach gives us a deeper understanding of your organisation, your particular culture and structure, the recruitment challenges you face, and the types of people you need to hire.

Modern recruitment is about matching the right people with the right companies, not just skills with a particular role.

### Industry sector expertise

Asset management, accounting & finance, asset servicing, legal and wider financial services industry experts

High expertise

Executive-level roles

High expertise

Senior-level roles

High expertise

Mid-level roles

High expertise

Entry-level roles

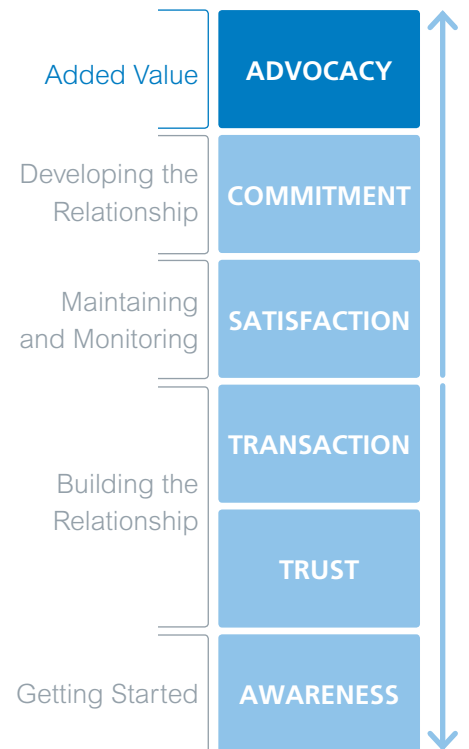
# The highest levels of engagement

Organisations are increasingly selective about the quality of the recruitment company that represents them. As a client, you have the right to demand high calibre consultants. After all, your corporate reputation is at stake.

We offer a discreet, professional and bespoke service that can be relied upon for its excellence. Our focus is on quality, not quantity. This is the philosophy behind our 'service not sales' approach to recruitment.

We go beyond the transactional, target-driven approach offered by many other recruitment companies. Our consultants do not make sales calls. The only targets we have is placing the right people in the right roles and providing our clients with the highest levels of service.

By operating on an advocacy basis, we protect and enhance your reputation among candidates and the wider marketplace. Through true engagement we go the extra mile, adding value to your business beyond the normal requirements of most partnerships.



Ipsos MORI's Advocacy Framework

**“We find Core-Asset to be proactive in helping us to identify the talented people we need, focusing not just on the specific technical skills required but also helping us identify those whose values and approach to work allows them to contribute positively from day one.”**

Heather Winpenny, People Consultant, Standard Life Investments



**“We match people –  
not just skills to**

## Our high value recruitment model

Unique within the recruitment industry in Scotland, our model combines the best aspects of executive search, contingency sourcing, preferred supplier agency and temporary recruitment strategies.

This approach enables a closer recruitment relationship between Core-Asset Consulting and your business. It provides us with a more detailed understanding of your corporate objectives and resourcing strategies, and helps us better anticipate your future resourcing needs.

This full-suite recruitment model also adds value by providing you with access to our existing recruitment infrastructure and a raft of additional specialist services, including salary benchmarking, market analysis and talent management advice.

**“Core-Asset took a real interest in the type of candidate I was looking for and why the role had come into existence. I had confidence they weren’t just looking for a quick turnover, going the extra mile to ensure I met with the candidate who was ultimately successful. They really gained my trust.”**

Graham Dow, Head of Investment Group Relationships, Standard Life



to companies,  
role profiles.”

Louise Powrie, Director, FinTech & Pensions

## Hybrid consultancy model

### Executive Search

- Lead & 2nd Consultant model
- Project management philosophy
- Access to both passive and active candidate pools
- Experts in restricted markets
- Leaders in innovative candidate attraction strategies
- Regular client reporting

### Contingency Recruitment

- Invoiced on completion of assignment
- Access to local & global markets & trends
- Experience in servicing extensive client list
- Supports in-house HR functions
- Efficient recruitment processes

Combined Benefits

### Preferred Supplier Model

- No sales calls or unsolicited CVs
- No unsolicited approaches to client company employees
- Long-term relationships
- Employer brand advocacy
- Well-structured and monitored service-level agreements

### Temporary Solutions

- Access to immediate temporary, interim & contract resources
- Management of workload spikes, e.g. maternity, paternity & long-term leave
- Responsive to changes in headcount, technology and regulations

Above all, this model offers the opportunity to increase recruitment efficiency, reduce bottom-line costs and enhance your reputation as a leading employer brand.

# Our market expertise

Core-Asset Consulting is the number one recruitment partner for many Scottish-based asset management and financial services companies. We have forged an excellent reputation for both the quality of our service and the quality of our candidates.

Our experience of tailored recruitment is underpinned by many years of knowledge and expertise across key sectors and specialisms.

## Recruitment specialisms

### Fund Management / Asset Management

- Fund/Investment Management
- Sector Analysis and Research
- Quantitative, Credit and Investment Risk
- Derivatives
- Treasury and Equity Dealing
- Liquidity Management
- Compliance, Governance and Operational Risk
- Fund Management Support
- Company Secretarial Services
- Portfolio/Fund Management (Equity, Fixed Income, Multi-Asset, Real Estate and Alternatives)
- Investment Analysis/ Portfolio Research
- Product Specialists / Client Portfolio Management
- Investment Governance and SRI
- Institutional Business Development
- Client Services and Relationship Management
- Marketing and Product Development
- E-commerce and Client Reporting
- Middle Office Investment and Fund Management Support
- Compliance, Legal and Risk
- Business Analysis and Project Management
- Investment Business Operations

### Asset Servicing

- Business Change (Middle Office)
- Entity Control
- Fund Governance
- Fund Performance
- Investment Mandate Control
- Investment Restrictions
- Investment Risk
- Middle Office Operations
- Middle Office Oversight
- Operational Risk (Middle Office)

### Investment Operations

- Corporate Actions
- Settlements
- Trade Support
- Transfer Agency
- Reconciliation
- Client Reporting
- Client Services and Relationship Management
- Vendor Management
- Performance Measurement
- Fund Accounting, Valuations and Pricing
- Business Analysis
- Project Management
- Transitions/Implementation
- Risk and Compliance
- Derivatives
- Business Support

### Accounting & Finance

- Accounts Payable / Receivable/ Billings
- Advisory
- Audit
- Corporate Finance
- Decision Support and Business Partnership
- Financial Accounting
- Financial Director/Controller
- Financial Planning, Analysis and Modelling
- Fund/Investment Accounting
- Management Accounting
- Part-qualified / Trainee Accountants
- Payroll
- Procurement
- Project / System Accounting
- Regulatory Reporting/Risk
- Tax
- Treasury

## Sector experience

- Asset Management
- Investment Operations
- Asset Servicing
- Accounting & Finance
- Technology, Fintech and IT
- Business Change
- Private Wealth Management
- Pensions
- Legal
- Sales and Marketing
- Business Support Services



# “The only targets we have are placing the right people in the right roles.”

Rachael O'Neill - Associate Director, Investment Operations and Accounting & Finance

## Technology, Fintech and IT

- 1st, 2nd, 3rd Line Support
- Application Business Analyst
- Application Project Manager
- Architecture
- Back End Developer
- Data/Database Analysis
- Delivery/Implementation Manager
- Enterprise Architect
- Front End/Web Developer
- Information Security
- IT infrastructure Business Analysis
- IT infrastructure Project Manager
- Product Owner/Manager
- Scrum Master
- Software Engineer
- Solutions Architect
- Systems Analyst
- Testing, Release and Defect Management
- UX/UI Design

## Business Change

- Business/Project Analysis
- Business Continuity
- Change Auditor
- Change Leader / Programme Director
- Change Manager
- Data Analysis
- Digital Transformations
- Organisational Design
- PMO
- Process Analysis
- Process Improvement and Business Efficiency
- Project and Change Management

## Private Wealth Management

- Wealth Management
- Investment Management
- Portfolio Management
- Portfolio Administration
- Financial Planning
- Paraplanning
- Sales Support
- Compliance and Risk
- Discretionary Fund Management
- Client Services and Relationship Management
- Private Client Administration

## Pensions

- Account Management
- Actuarial
- Advisory/Business Development
- Client Services and Relationship Management
- Compliance
- Customer Services
- Defined Benefit (DB)
- Investment Consultancy
- Investment Solutions
- Paraplanning
- Pension Administration
- Pension Consultancy
- Product/Proposition Management
- Protection
- Risk (Pensions)
- SIPP (Self Invested Personal Pensions)
- Wrap/Investment Platforms

## Legal

- Partnership Appointments
- Associates / Senior Associates
- Legal Directors
- General Counsel
- Solicitors / Senior Solicitors
- Legal Advisors / Senior Legal Advisors
- Legal Counsel
- Paralegals
- Regulatory Risk and Compliance
- Company Secretary
- Human Resources
- Business Development/Marketing
- Finance
- Expert advice and unrivalled support

## Sales & Marketing

- Brand Management and Marketing
- Business Development/Sales
- Copywriting / Investment Writing
- Digital Marketing
- Event Management
- Graphic Design
- Market Research
- Marketing
- Marketing Communications
- Media
- Product Development
- Public Relations (PR)
- Relationship Management
- Request for Proposal/Information (RFP/RFI)
- Sales Support
- Social Media/Content Management
- Web Design/Production

## Business Support

- AML (Anti Money Laundering)
- Compensation/Benefits/Rewards
- Customer Service
- Call Centre
- Executive and PA
- Enterprise Risk
- Facilities Management
- Human Resources
- Information Security
- Office Management
- Operational Risk
- PA/Executive Assistant/Santerra
- Procurement
- Reception
- Resourcing/Recruitment
- Risk and Compliance
- Training/Learning and Development

# Permanent recruitment process

Our permanent recruitment process is designed to ensure that candidates are assessed on their merits and abilities, and selected according to the specific needs of you, the client.

Consisting of six main stages, it provides organisations with access to a robust, repeatable and consistent high-quality recruitment process across all our divisions and consultants.

## 1. Client research

We work closely with HR and hiring managers to understand your working environment, succession planning issues, departmental personalities, cultural fit, etc.

## 2. Candidate search

We use referral and recommendation, database selection, advertising and proactive networking. We identify the best candidates not merely the most actively available.

## 3. Candidate selection

We pre-interview and pre-screen applications. We work with the applicant, tailoring and formatting CVs for consistency and highlighting all relevant skills and abilities.

## 4. Candidate support

We manage the candidate process, ensuring applicants are prepared for interview, have researched your company and the role, and are ready to discuss relevant skills and experience.










## 5. Candidate screening

On successful appointment, our specialist division Core-Asset Verify can manage the applicant screening process for you, including financial probity, criminal, qualification and referencing checks.

## 6. Delivery

Our process ensures greater success in identifying suitable applicants, a streamlined recruitment process, higher levels of candidate engagement and increased levels of employee retention.

## Process – a summary

1. We ask all applicants to provide us with a comprehensive copy of their CV  

2. An initial interview is arranged to discuss career objectives and aspirations  

3. Role profiles are provided for suitable vacancies within our client companies  

4. Once we have confirmation they are happy to have their details submitted for a specific role, we forward their CV (which has been formatted into our house style)  

5. If their application is successful, we contact the candidate to arrange a mutually convenient time to meet with our client to complete the interview process  

6. Candidates will be provided with a copy of their CV in our house style, interview guidance, confirmation letter and details regarding the client company  

7. A meeting is arranged between the consultant and the candidate to discuss the interview and content in more detail  

8. Once the candidate has undertaken the interview, they are provided with feedback as soon as this is available  

9. Should the candidate be offered a position, the consultant negotiates the process to ensure the candidate receives the package details as soon as possible  

10. We maintain regular contact with the applicant up to and beyond their start date

**“We have worked with Core-Asset Consulting for many years and have always been impressed with the team’s knowledge of the sector. From day one, the Core-Asset team has put forward only candidates that it thinks will be successful long term employees of our business.”**

Mark Murray, Chief Operating Officer, Artemis Investment Management

**“We were greatly impressed by the level of knowledge Core-Asset Consulting has about the asset management industry & its enlightened recruitment approach.**

**Our partnership ensures that we not only hire the best people in the market but also – through their HR & training support – retain & develop them as well.”**

Stuart Gunderson  
Chief Operating Officer, Kiltearn Partners



“Many companies  
number one

## Temporary and day-rate recruitment

The sourcing of high-calibre temporary and day-rate workers is just as important as the recruitment of permanent employees. Not only can they lead to permanent placements through the increasingly common temporary-to-permanent route, but they also offer the business flexibility in navigating through peaks and troughs in workload.

### Core-Asset Solutions

A division of Core-Asset Consulting, the Core-Asset Solutions team have a passion and dedication to sourcing the ideal candidate on every occasion. We have an appreciation that the time frames involved in interim recruitment can be demanding. We pride ourselves on our ability to work efficiently in a time restricted manner, while refusing to compromise on quality of service.

Our specialist consultants are fully trained to advise clients on the employment and industry regulations which could impact assignments, including the Agency Workers Regulations (AWR), Employment Agencies Act (EAA) and IR35.

Our recruitment services span the entire spectrum of positions across our permanent divisions. Our most common areas include:

- Customer Services, Investment Administration & Office Administration
- Business Support, including Secretarial & Human Resources
- Project Management & Business Analysis
- Management & Fund Accountancy
- Finance
- Risk & Compliance
- Sales & Marketing



**consider us their  
recruitment partner.”**

Mike Stirton, Director, Core-Asset Solutions, Verify & Engage

## Vetting and on-boarding services

Vetting and on-boarding are critical stages in the recruitment process. High standards of communication between service provider, client and candidate are crucial in speeding up completion times, mitigating the risk of applicant dropout and enhancing employer brands.

### Core-Asset Verify

Core-Asset Verify, a division of Core-Asset Consulting, provides financial sector employers with an integrated vetting and contract management service for new hires.

Based on clients' existing requirements, Core-Asset Verify's vetting procedures are designed to provide a robust, transparent and uniform process for ensuring that prospective employees are fit and compliant to begin work.

By creating a platform for professional judgements supported by clear recommendations, we provide a pragmatic process for distinguishing between wilful acts of dishonesty or fraud and administrative errors or other anomalies.

We also offer a digital contract management service for permanent and interim hires. This utilises state-of-the-art technology for a fast and efficient process, including document download and upload facilities and a legally-binding electronic signature system.

In addition to this, our highly-trained consultants are on hand to facilitate the signature of contracts and answer any applicant queries.

This combination of the latest technology supported by readily-available expert consultants ensures the very best applicant journey.



**“Our processes are tailored  
across different time zones**

## International sourcing

The financial sector in Scotland has traditionally had access to a relatively small and finite pool of talent. If it is to expand at home and overseas, it needs to hire high-calibre individuals in greater numbers than ever before. Inevitably, this demand cannot be met entirely from the domestic market, nor is it desirable to do so.

A diverse and cosmopolitan workforce is increasingly important in today's global marketplace. Having employees who reflect the breadth and depth of your organisation's international reach and varied client base means your business is better placed to meet the challenges it faces.

Core-Asset Consulting has been recruiting across the Scottish financial sector since 2005. In that time we have placed a substantial number of internationally-based applicants with our clients in Scotland.

Locations include Budapest, Dubai, Dublin, Frankfurt, Hong Kong, Krakow, Luxembourg, Melbourne, Milan, New York, Paris, Poznan, Singapore, Sydney, Toronto, Warsaw and Zurich.

As a career partner of choice for many financial professionals in Scotland, we have also maintained relationships with domestic candidates throughout this period, even when their careers have taken them overseas.

As a result, we have built up a strong network of professionals - Scottish, UK expatriates and other nationalities - who would consider returning or relocating to Scotland.

# to meet the demands of recruiting and multiple geographies.”

Betsy Jane Williamson, Managing Director

Regardless of geography, we work to identify the best possible candidates for the role as opposed to the most actively available.

Although candidates come to us from across the globe, we focus our sourcing efforts on key international financial hubs where our clients and their competitors already have a presence (see below).

These include:

- Asia-Pacific – Hong Kong, Melbourne, Shanghai, Singapore and Sydney
- Europe – Dublin, Paris, Frankfurt and Luxembourg
- Middle East – Abu Dhabi, Dubai and Qatar
- North America – Boston, Chicago and New York



*World's key financial hubs*

## Our senior recruitment team

With a combined experience of well over 60 years, our senior team is well versed in dealing with the recruitment challenges facing financial and legal organisations in the 21st century.

They are supported by a team of specialist recruitment experts, industry professionals and high-performing graduates.



Betsy Williamson, Managing Director

Betsy founded Core-Asset Consulting in 2005 whilst working towards her Master's in Human Capital Management, she initially graduated with a BA Hon's in International Business in 1999. Betsy has spent her entire career within Asset Management and Investment Recruitment in Scotland.

Together with her role as Managing Director Betsy is also responsible for the company's Executive Search capabilities, where she has built up a reputation as one of Scotland's premier recruiters.



Louise Powrie, Director, FinTech and Pensions

Louise is the co-founder of Core-Asset Consulting, she is an experienced recruitment specialist with over 20 years' experience, initially within asset management Louise transitioned to FinTech, Platforms and Pensions following client demand in these areas.

Together with her sector level specialisms Louise is responsible for the day-to-day management of the permanent recruitment team.



**“As a client, you have the right to demand high calibre consultants.”**

Louise Powrie, Director, FinTech and Pensions



Mike Stirton, Director, Core-Asset Solutions, Verify & Engage

Mike has nearly 20 years' experience exclusively with temporary, interim and contract recruitment services.

He is responsible for the recruitment of Senior Executive, Business Change and IT roles across a wide range of specialist fields.

Mike also oversees Core-Asset Solutions, Core-Asset Verify and Core-Asset Engage, providers of temporary hires at all levels and vetting and on-boarding services respectively.



Rachael O'Neill, Associate Director, Investment Operations and Accounting & Finance

Rachael has been recruiting since 2004 specialising in permanent roles within Investment Operations. She has wide-ranging experience in asset servicing across back office and middle office together with Accounting and Finance.

Rachael is passionate about ensuring candidates and clients receive a truly consultative service.

## Ethics above all

Core-Asset Consulting is passionate about treating its clients and candidates in an ethical and professional manner.

Our people-focused, service not sales approach to recruitment ensures a clear alignment of interests between our clients, candidates and consultants.

This enables us to forge lasting relationships with professionals throughout their careers and employers during each stage of the economic cycle.

## Helping your business grow

Whether you're wishing to fill a specific position, keen to find out about the latest market trends or just looking for advice, we're here to help.

For more information about the services we offer, please get in touch:

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