Schroders Personal Wealth creates new senior roles as growth accelerates

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Schroders Personal Wealth (SPW) continues to demonstrate its commitment to quality financial advice with the addition of two professionals to its Client Office Senior Leadership Team.

SPW implemented a new structure within its Client Office at the beginning of 2023, which led to the introduction of regional managers and advice quality managers. The structure has further enhanced the SPW proposition, enabling the group to maintain the highest quality of financial advice and assist an increasing number of clients.

As part of SPW's evolution, new roles have been created to support the company's growth ambitions, with Katie Young joining as Head of Commercial, and James Harris assuming the role of Head of Advice Services and Investment Engagement, both effective 4 November.

Young has more than two decades of leadership experience in wealth management and financial services, having previously held senior positions at Coutts & Co. and the Financial Conduct Authority (FCA). She will focus on further developing SPW's operating model, including enhancing practice management capabilities and leveraging technology to improve client and colleague experiences. Young will also lead SPW's relationship with Lloyds Banking Group's (LBG) retail channels, utilising innovative solutions to enhance client outcomes.

Harris, who has worked closely with SPW over the past year, will be tasked with consolidating technical support for advisers and clients. He will oversee the creation of a centre of excellence for technical support and will be instrumental in embedding consumer duty across the group.

Evolving regional leadership

In addition to these new appointments, SPW is optimising its regional leadership structure, with the streamlining of its wealth regions from four to three: South, North, and Scotland and Northern Ireland.

Rew Hassall will expand his leadership to include the south west part of the country, which forms the new South wealth region. Jo Westwood will lead the North wealth region, continuing to drive the strategy across northern England and Wales. Donald Gateley will remain responsible for Scotland and Northern Ireland, while also leading SPW's relationship with the commercial arm of LBG at a national level. Additionally, Justin Blower will lead SPW's financial planning channel, which is harnessing technology to continually enhance the client experience.

Ben Waterhouse, Chief Client Officer of SPW, comments: *"At SPW, our mission remains to make high quality financial advice more simple, affordable, and accessible. We have made strong progress throughout 2024 with a relentless focus on delivering for our clients and colleagues. The evolution of our leadership model and the addition of Katie and James will ensure we are well placed to build upon this success in the coming years"*

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Notes to Editors

Schroders Personal Wealth is a joint venture between Lloyds Banking Group and Schroders – two of the UK's largest names in banking and asset management.

We were created to help more people across the UK benefit from financial advice. We have the advantage of solid foundations and a strong heritage. But we take a fresh, transparent and personal approach to financial planning.

We aim to provide clients with clarity and transparency in everything we do. This includes using technology to explain how long-term financial planning can add value to peoples' lives; to give people access to information about their financial wellbeing, and to communicate with their adviser when it's convenient for the client. Our heritage may be 400 years old, but our approach is built for the future.

For more information visit https://www.spw.com