

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

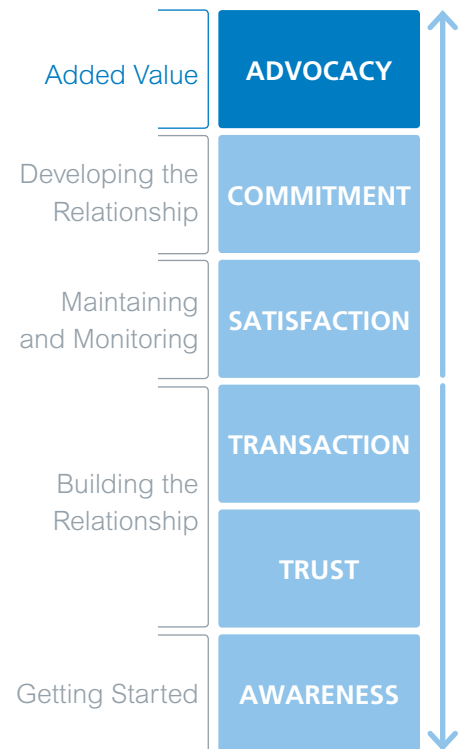
The highest levels of engagement

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, Financial Services

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

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

Combined
Benefits

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.

Sector experience

- Asset Management
- Investment Banking
- Third Party Administrators
- Global Custody Banking
- Financial Services & Wrap Providers
- Life & Pensions
- Private Client Managers
- Wealth Managers
- Private Banking
- Insurances Houses
- Public Practices
- Actuarial Consultancy Practices
- Management Consultancies
- Legal Practices

Recruitment specialisms

Asset Management

- Fund Management / Investment Management
- Sector Analysis & Research
- Quantitative, Credit & Investment Risk
- Derivatives
- Treasury & Equity Dealing
- Liquidity Management
- Compliance, Governance & Operational Risk
- Fund Management Support
- Company Secretarial Services

Asset Servicing

- Fund & Investment Administration
- Client Services
- Performance Measurement
- Trade Support / Share Dealing
- Relationship Management

Accountancy & Finance

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



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

John Docherty, Director – Accounting & Finance and Legal

Wider Financial Services

- Life & Pensions
- Private Client Management
- Private Banking
- Wealth Managers
- Operations
- Paraplanning & Sales Support
- Asset Management & Investment Management
- Administration
- Management / Leadership
- Technical
- Training & Compliance
- Sales & Marketing
- Mortgage Broking
- Actuarial Consulting
- Group Risk

Legal

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

Marketing & Business Development

- Communications
- Generalist Marketing / Events & Publishing
- Institutional & Retail Sales
- Product Development / Investment Writing / Research
- Design & Desk Top Publishing

Business Support Services

- Executive / Personal Assistants & Secretaries
- Human Resources
- General Administration & Receptionists
- IT / Business Analysts / Project Management
- Legal & Property Support

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, Kiltarn 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 & Core-Asset Verify

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."

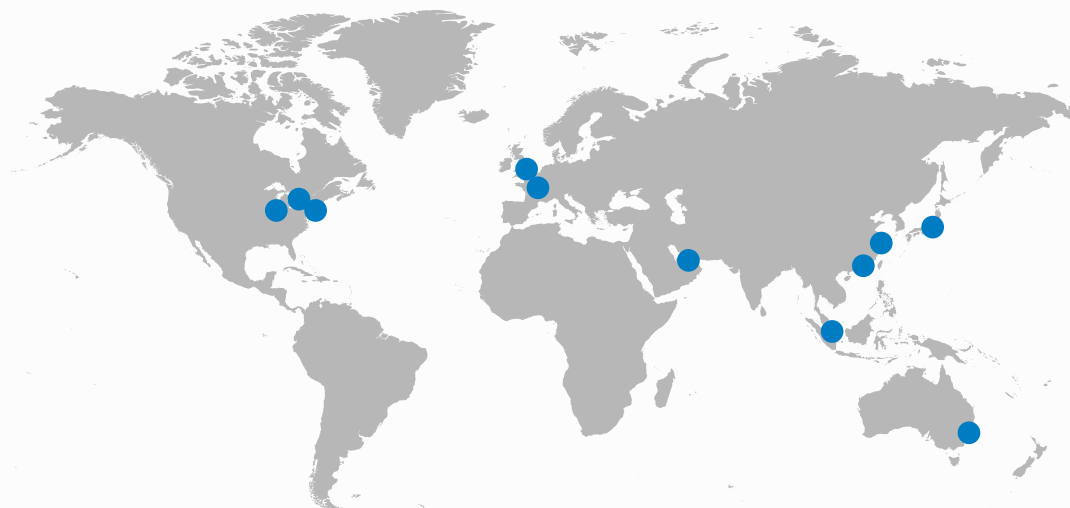
Betsy Jane Williamson, Managing Director

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, Director, Asset Management

Betsy is responsible for Core-Asset Consulting's Asset Management division, where she has built up an enviable reputation as Scotland's leading fund management recruiter. She is also the founder and Managing Director of Core-Asset Consulting.

Betsy has spent her entire career within the recruitment industry. While completing a masters in human capital management, she launched Core-Asset Consulting in 2005.



Louise Powrie, Director, Financial Services

Louise is an experienced recruitment specialist with over 15 years' experience within the asset management and financial services sector in Scotland.

She is responsible for the recruitment of senior executives across a wide range of specialist fields, including Fintech, Asset Management, Wealth Management, Platforms, Investment Operations, Product, Proposition and Strategy, Sales and Marketing, Business Analysis, Project Management and Research.

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

Louise Powrie, Director, Financial Services



Mike Stirton, Director, Core-Asset Solutions & Verify

Mike is an experienced recruitment specialist with a career spanning more than 15 years within the asset management and financial services sector in Scotland.

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 and Core-Asset Verify, 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 Financial Services. She has wide-ranging experience in Asset Servicing, Asset Management, Investment Banking and Accounting & Finance

Rachael is passionate about always 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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