

## Hargreaves Lansdown, Role Profile and Person Specification

### Role Profile

<b>Job Title:</b> Head of Equity Research	<b>Hours of Work:</b> Monday to Friday 8am to 5pm
<b>Department:</b> Investment Department	<b>Reporting To:</b> Investment Director

#### Summary:

Hargreaves Lansdown are leaders in managing fund of funds and providing fund information and recommendations directly to retail clients. It is our objective to be able to replicate this service with UK equities. We want to build a private client share portfolio management service offering and disseminating the best information and recommendations to retail clients

#### Key Duties & Responsibilities

- Responsibility to develop a shares business and deliver investment direction on shares
- Manage and recruit a team of analysts/equity portfolio managers
- Direct equity recommendations for use in private client portfolios
- Provide recommendations via our website and written publications
- Become part of the wider investment team that includes quantitative analysts, fund managers and fund analysts and work closely with our PR team
- Deliver our company aim to provide 'best information, best service and best prices' in share research and management
- Deliver excellent stock recommendations and helpful investment tools together with a saleable and scalable discretionary share management service

### Person Specification:

	Essential	Desirable
<b>Qualifications</b>	<ul style="list-style-type: none"><li>• Degree or equivalent</li></ul>	<ul style="list-style-type: none"><li>• IIMR Associate or CFA Charterholder</li></ul>
<b>Knowledge</b>	<ul style="list-style-type: none"><li>• Detailed knowledge of UK equities</li></ul>	<ul style="list-style-type: none"><li>• Knowledge of global equities</li></ul>
<b>Experience</b>	<ul style="list-style-type: none"><li>• Experience of building and managing a team</li></ul>	<ul style="list-style-type: none"><li>• Demonstrable track record showing that the individual can pick stocks that outperform</li><li>• Management of discretionary or advisory share services</li><li>• Experience of a number of market cycles</li></ul>
<b>Competencies</b>	<ul style="list-style-type: none"><li>• Exceptional numerical skills</li><li>• Proficient with MS Office</li><li>• Good attention to detail</li><li>• Able to assimilate data and produce jargon-free, succinct information suitable for retail investors</li></ul>	<ul style="list-style-type: none"><li>• Develop a clear and sustainable investment philosophy</li></ul>
<b>Attributes</b>	<ul style="list-style-type: none"><li>• Team player</li><li>• Tenacious and well organised</li><li>• Dependable</li><li>• Keen to develop a long term career in Bristol</li></ul>	<ul style="list-style-type: none"><li>• Innovative</li></ul>

Written by: **Investment Director**

Authorised by: **Peter Hargreaves**

Date: **March 2014**