The Rathbones Institute

A 24-month programme for experienced professionals ready to build a new career in wealth management.

Invest well. Live well.

RATHBONES

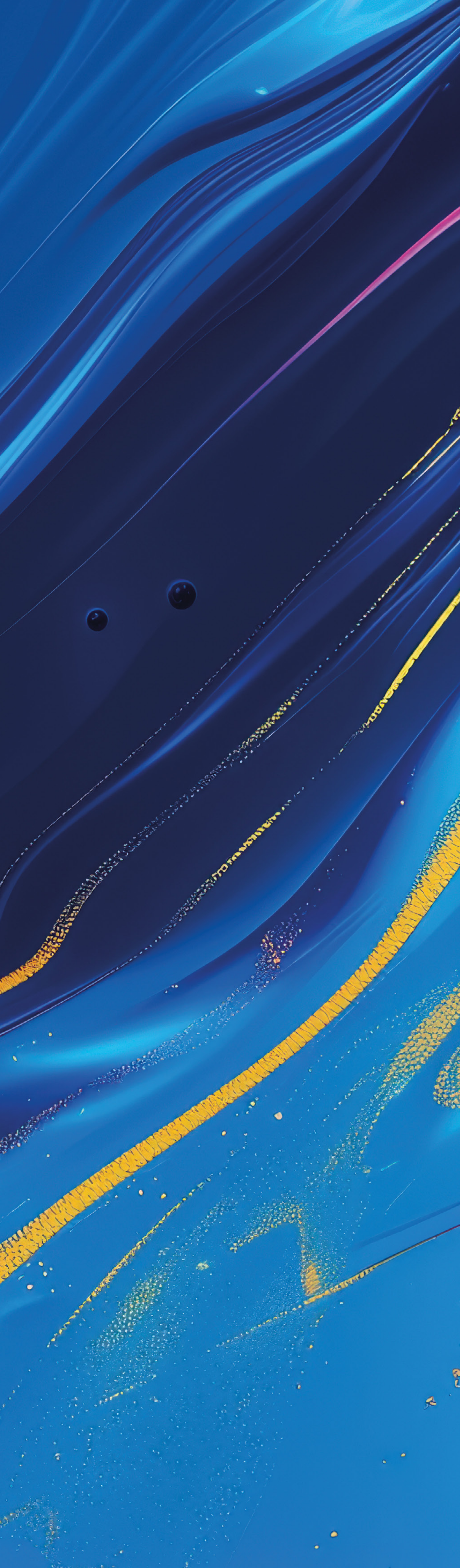
Your next career.

Built on everything you’ve already achieved.

The Rathbones Institute is for experienced professionals from any background who are ready to build a new path in wealth management. This is a structured route into a permanent, long-term career – you will learn alongside others, receive regular feedback and have the support you need to build your confidence and capability at every stage.

Success in wealth management starts with understanding people, earning trust, and helping clients make confident decisions over the long term. These qualities can come from many different professional and personal backgrounds.

You do not need previous experience in financial services. What matters is what you have achieved, how you work with people, and your motivation to take your career in a new direction. Your career so far is not a detour – it’s your greatest asset.



About Rathbones

Our purpose is to help more people invest their money well so they can live well. We take the time to understand our clients and their goals, then provide the financial planning and investment advice they need to make confident decisions about their future.

We are one of the UK's leading wealth managers, and one that is changing fast. We manage £120.7 billion for our clients (as of June 2026), we employ more than 3,300 people across 21 offices nationwide, and we are a FTSE 250 business with a clear ambition: to become the best wealth manager in the UK, by far. That means investing in our technology, our propositions and, above all, our people – which is exactly why the Rathbones Institute exists.

Our clients are a diverse range of high-net-worth individuals, families and charities. They have different circumstances, priorities and plans, and many relationships are built and maintained across generations. Our approach is personal and built for the long term – more than half of our clients stay with us for over 15 years.

So you get both: the security of an established business with real scale, and the energy of one that is changing to become the best, by far. Once you complete the programme, you will have the knowledge, practical experience, relationships and ongoing support to keep building your career at Rathbones.

01

The programme

The Rathbones Institute is a supported, fully funded 24-month programme. It combines group learning, individual study, time with experienced Investment Managers, practical on-desk experience, and mentorship. Your support will be tailored to you – if you already hold relevant qualifications or experience, your development pathway may be adapted accordingly.

01 – Supported Qualification

January to May 2027

The Institute begins with a one-week in-person induction at Rathbones' London office, where you meet senior leadership and shadow an Investment Manager to gain first-hand insight into the role.

You will then begin full-time study towards the CISI Investment Advice Diploma. This won't be solitary study, but a combination of group learning, time with Investment Managers, tutor support, mentoring and practical application. Participants who already hold relevant qualifications may follow an alternative route where agreed.

02 – On Desk

June 2027 to November 2028

From June 2027, you'll work on desk four days a week and spend one day a week studying towards the CISI Chartered Wealth Manager qualification (Level 7), supported by Rathbones colleagues, Fitch Learning, and AI-enabled tools.

You will also begin building relationships and the foundations of a long-term client book, with the appropriate support and supervision. By the programme's end, you'll have industry qualifications, practical experience, and the groundwork for long-term client connections.

03 – Post-Qualification

November 2028 – ongoing

Support continues after the programme through an in-house coach, ongoing professional development, and mentoring in client relationships. As your experience develops, you can progress in the direction that best fits your strengths and ambitions – whether in Investment Management, Financial Planning or another area of wealth management.

02

Who we're looking for

Whether you have spent years building a successful career in a different industry or are returning to work after time away, we believe experience comes in many forms. Your professional and life experience may have shaped the way you build trust, understand people, and create opportunities – qualities we want you to bring with you.

You might come from consulting, law, financial services, the armed forces, elite sport, healthcare, education, technology, or somewhere else entirely. What matters is what you've achieved and what you want to do next. You could be a strong fit if:

- **You have a strong professional track record, typically built over 10 or more years.**
- **You have demonstrated strong results in your previous role.**
- **You are curious about people, financial markets, and the world that shapes them.**
- **You are comfortable learning new information and applying it in unfamiliar situations.**
- **You communicate clearly, listen carefully, and show empathy in your interactions with others.**
- **You can consider different perspectives, test assumptions and make balanced judgements.**

You do not need an existing background in finance. We are interested in the qualities, experience and motivation you bring, and your potential to develop the technical knowledge required for the role.

03

The application process

Application – 01

Apply now on this page. Tell us about your experience, your motivation and what you want to do next.

Initial assessment – 02

Shortlisted candidates will complete an online assessment focused on the qualities relevant to the Institute, including learning agility, judgement, communication, and relationship building.

Video interview – 03

Selected candidates will be invited to complete a one-way video interview, where they will record answers to pre-set questions instead of speaking live with an interviewer. This is an opportunity to explain your experience, motivation and approach to working with people.

Assessment centre – 04

Final candidates will attend an in-person assessment centre at Rathbones. You will meet members of the team and take part in activities designed to explore how you communicate, learn, reason and respond to different situations.

Offer – 05

Successful candidates will receive an offer to join the cohort, starting in January 2027.

Your experience has already taken you a long way. Now, the Rathbones Institute can help you build on it – with structured development, practical experience and long-term support as you begin a new career you'll love in wealth management.

The role is fully employed and salaried from day one. Further details about the employment arrangement and reward package will be provided as part of the application process.

Apply now for the January 2027 cohort.

If you have questions, please feel free to contact our recruitment partner, Ladder:

LADDER by the Unseen Group

hello@laddergroup.com