

JM Finn – CASE STUDY

The apprenticeship campaign was successfully completed in 2022.

ABOUT JM FINN

JM Finn are a wealth management company who offer high quality, personal investment management. They offer a personalised approach to both private and professional investors. They pride themselves on a 'high quality' service and this is shown through a recent survey that over 1,600 of their investors replied to, this resulted in 99% customer satisfaction which exceeded their benchmark.

BACKGROUND

After a successful Graduate campaign earlier in the year, JM Finn approached Cohesion to partner with them again to recruit their Apprentices, specifically opening up opportunities for young people from all backgrounds, whilst supporting JM Finn's Diversity/Inclusion and social mobility policies.

The apprenticeship offered young people who had a genuine interest in a career in Investment Management an opportunity to work within experienced teams, learn and develop skills and study alongside for the CISI Level 3 Investment Operations Certificate.

Cohesion offered support throughout the whole of the process to both JM Finn and the candidates that were being progressed through the recruitment process. Cohesion assisted with preparation for the assessment centre and promoted the benefits of an apprentice opportunity throughout:

- Earn while you learn for your preferred job
- Get paid holidays
- Study for a recognised qualification, that is paid for
- Gain hands-on, real-life work experience
- Develop your own skills
- Improve your employability
- Benefit from support from a buddy/mentor

Recognising JM Finn's requirements for increasing diversity and widening opportunities within wealth management, Cohesion facilitated conversations between them and the Brokerage, with whom Cohesion has a well established relationship. The Brokerage are a social mobility charity supporting young people into opportunities and strive to drive real change in the workplace.



RESULTS

Cohesion successfully recruited the required number of apprentices and could have possibly recruited 2 more if positions were available.

Our focus on candidate experience and support throughout the process resulted in:

- 100% attendance at assessment centre
- Positive feedback from both candidates and JM Finn staff
- Offer quality at assessment centre surpassing the requirement
- Over 50% of candidates at application through to assessment centre attended schools with low social mobility index scores

Candidate feedback –

“My application with JM Finn was well guided and well organised throughout the whole process”

“Updates were provided throughout the process almost on a weekly basis”

“Found talking to current employees throughout the assessment centre beneficial and the exercises throughout the process were relevant to the role”

If you'd like to discuss how Cohesion can collaborate with you on a successful recruitment campaign, please don't hesitate to get in touch with Deborah Edmondson at debbie.edmondson@cohesionrecruitment.com or on 0121 716 3977