



**EVERYTHING  
YOU'D EXPECT  
BUT MORE...**



## Contents

- 05 Who we are
- 06 Our programmes
- 09 Assurance & business services
- 11 Business tax
- 13 Forensic services
- 15 Investment management
- 17 Private client tax services
- 22 Entry requirements & Application process

# ENTREPRENEUR SHAPING FUTURE LOOKING OPPORTUNITY MAKING

WE ARE SMITH & WILLIAMSON.

EVERYTHING YOU'D EXPECT, BUT MORE

# CHALLENGE EMBRACING START-UP GROWING BOUNDARY BREAKING

## WELCOME TO SMITH & WILLIAMSON

a firm that offers everything you might expect, and plenty more...

## Who we are

As a leading, independently-owned financial services firm, we offer unprecedented variety – not least because we're home to an accountancy practice, an investment management arm and a private bank. It's our breadth of services that makes us unique in the industry. We work with a broad range of clients too – start-ups, multinationals, high-net-worth individuals, professional practices and non-profit organisations.

We can offer you much more responsibility than you might expect. You'll be working on real projects and liaising with our clients from the start – it's our approach to clients that makes this a more fulfilling place to work. We pride ourselves on our ability to build meaningful, long-lasting relationships with them.

What's more, we have 12 offices around the UK, Ireland and Jersey, and we're a member of Nexia International, a top 10 global network of independent accounting and consulting firms. This means we're well-connected to thousands of colleagues around the world, exchanging knowledge and professional expertise daily.

A career here means having more you-time than you might get in other firms. We believe in getting that work/life balance just right because it's not just good for you, it's good for us too.

We believe in getting that work/life balance just right.

If you're looking to get more out of your future, we think you'll love life with Smith & Williamson.

## Graduates

You'll never know how satisfying it is to be a young professional until you walk through the doors at Smith & Williamson. If you're the kind of person who likes to follow your own path and you're looking for something more from your future career, we think you'll fit right in with us.

Our structured graduate training programmes cover a broad range of areas to produce the future's brightest accountants, tax advisors and investment managers. Each one is driven towards you becoming ACA, ATT, CTA or CISI qualified.

We've struck the balance just right. We're not so big we'll overlook your potential, but not small either. One of the greatest things about life here is that you get exposure to many different clients and a wide range of industries, so your opportunities are never limited. In fact, we're big believers that the best way to learn is to throw yourself into new challenges, so you'll be taking on real work from the outset and gaining early responsibility. That's not to say this is a sink-or-swim kind of place – we offer fantastic training, strong support (including from our most senior people), mentoring and the kind of collaborative culture that means there'll always be someone on hand to offer help and advice.

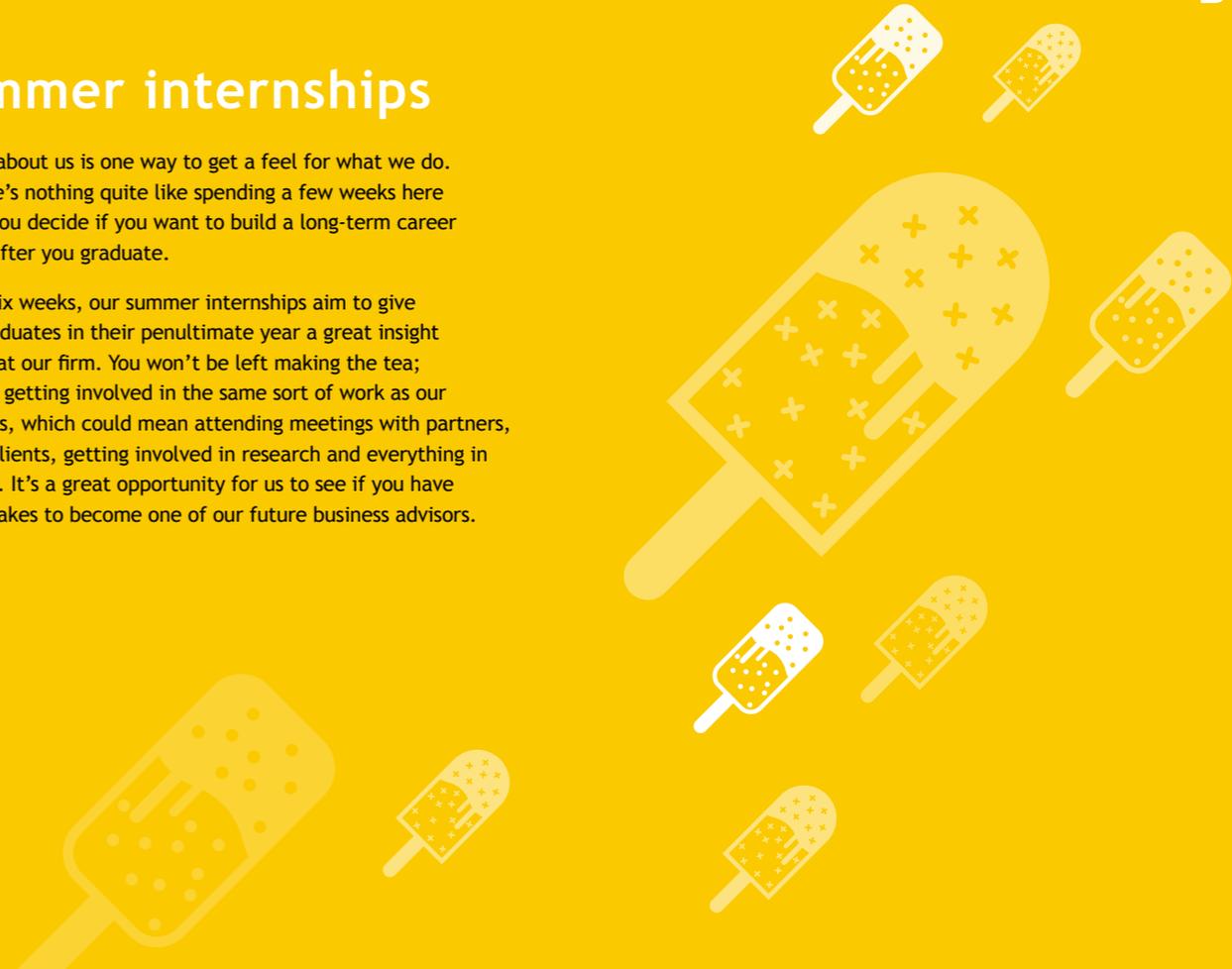
We're prestigious, but familiar. Here, the atmosphere is friendly and everyone is approachable. We're all invested in your journey, especially the partners.



## Summer internships

Reading about us is one way to get a feel for what we do. But there's nothing quite like spending a few weeks here to help you decide if you want to build a long-term career with us after you graduate.

Lasting six weeks, our summer internships aim to give undergraduates in their penultimate year a great insight into life at our firm. You won't be left making the tea; you'll be getting involved in the same sort of work as our graduates, which could mean attending meetings with partners, visiting clients, getting involved in research and everything in between. It's a great opportunity for us to see if you have what it takes to become one of our future business advisors.



EVERYTHING YOU'D EXPECT, BUT MORE

# CLIENT FACING ADVICE GIVING FACT CHECKING

## Assurance & business services

Many businesses need to reassure investors and other stakeholders on their financial performance, even where a full audit isn't necessary, appropriate, or required by law. We provide wide-reaching financial advisory services to international clients across a number of industries. Most of our audits last just one or two weeks, which means you'll gain exposure to a broader range of businesses and industries than you would elsewhere.

Much of our work revolves around external audit, which we provide through worldwide accounting and consulting network Nexia International. Working alongside managing and financial directors, you'll provide advice and solutions that will make a tangible difference to a range of organisations. It's a great way to build first-hand client experience as you undertake your professional qualification training.

But this is about more than auditing – it's about providing assurance to large businesses responsible for thousands of livelihoods, professional practices that have built themselves from the ground up, and charities whose attentions are better spent elsewhere. This combined experience will help you develop all the skills you need to become a successful auditor and a trusted business advisor. In fact, by the second year of your training programme, you could be promoted to a more senior role, helping to supervise the new intake of trainees.

## YOUR PROFESSIONAL QUALIFICATION:

Full study support for the Associate  
Chartered Accountant (ACA) qualification.

EVERYTHING YOU'D EXPECT, BUT MORE

# TAX ADVISING BORDER CROSSING BUSINESS REASSURING

## Business tax

When it comes to Business Tax Services, we offer far more variety than you might expect. We have some of the most comprehensive services in the UK, as well as a very diverse client base. Whether a family business or a large multinational group, our clients need to be able to satisfy the tax authorities and other stakeholders that their tax affairs are in order. As HM Revenue & Customs (HMRC) uses increasingly sophisticated review processes, it takes time and resources to understand and respond to complex tax legislation.

Working closely with our senior tax professionals, you'll feel yourself improving day by day as they teach you the intricacies of their trade. One moment you could be helping a small business ensure they are tax compliant; the next, you could be learning the complex, but fascinating cross-border considerations of international tax. You could even find yourself providing support to a company in the middle of a full-scale tax investigation.

This programme will impart all the techniques you need, as well as show you how to communicate effectively with clients and HMRC.

## YOUR PROFESSIONAL QUALIFICATION:

Full study support for the joint  
Chartered Taxation Adviser (CTA)/  
Associate Chartered Accountant  
(ACA) qualification.



EVERYTHING YOU'D EXPECT, BUT MORE  
**EVIDENCE HUNTING**  
**CURIOSITY**  
**SPIKING**  
**CONFLICT SOLVING**

## Forensic services

This fascinating, but complex area of accounting requires expertise and resources. As a top 10 UK accountancy practice (Accountancy Age, 2016), we have plenty – so you're in the best possible place to be trained as a Forensic Accountant.

The projects you'll assist on will be both exciting and imperative to our clients. Your work could help businesses who have been the victims of fraud recover lost assets. Or solve long-standing commercial disputes that previously had no end in sight. Your findings could even be used as evidence in a court of law. When the outcomes are as fundamental as in these cases, you need the unquestionable trust of your clients. So, if this is an area you're thinking of specialising in, sharing in the phenomenal experience and reputation of Smith & Williamson is the way to new career heights.

We can ensure you power ahead with the industry's best practices and build the technical expertise to use advanced forensic services software. Many companies now store their data electronically, so rather than wading through millions of streams manually, our e-disclosure solution, IPRO Enterprise, will enable you to navigate this minefield quickly and effectively. You'll develop skills many professionals at other firms still haven't acquired.

## YOUR PROFESSIONAL QUALIFICATION:

You'll receive full study support for the Associate Chartered Accountant (ACA) qualification.



EVERYTHING YOU'D EXPECT, BUT MORE

# RISK MANAGING WEALTH ENHANCING ASPIRATION REALISING

## Investment management

It takes a very impressive skillset and knowledge-base to earn the trust of a private investor. Our aim as an investment service is to understand the needs of our clients and create tailored solutions that enable them to both preserve and grow their wealth. We don't limit ourselves to one in-house investment style, which means there's no limit to the insights you can provide.

With over 170 qualified investment managers and over £19 billion of funds under management and advice, we have an exceptional track record spanning over a century. As an Investment Management trainee, you'll be learning a well-respected profession at a firm with an unparalleled reputation. We'll teach you how to assess global economic strategies, understand how asset classes are ranked, and select sectors, stocks and funds as you evaluate risk while constructing high-performing portfolios that exceed your clients' expectations.

This is a hugely dynamic part of our firm – and it's growing rapidly. Which means you can expect more scope for progression and development as you grow in experience.

After spending your first year rotating through placements in our investment settlement operations, compliance and front office departments, you'll join a desk permanently where you'll begin dealing with clients and developing a highly promising career.

## YOUR PROFESSIONAL QUALIFICATION:

Full study support for the Chartered Institute of Securities and Investment (CISI), Investment Advice Diploma (IAD) and Chartered Wealth Manager qualifications.



EVERYTHING YOU'D EXPECT, BUT MORE  
**AWARD WINNING  
CHALLENGE  
EMBRACING  
QUICK THINKING**

## Private client tax services

If you want to be part of an award-winning Private Client Tax Services business, we don't think you'll find a better place to embark on a career. We've been advising individuals, businesses and trusts for over 100 years.

This is a challenging and constantly evolving area in which your skills will be highly valued by our clients. No two days are ever the same and your unique perspective will influence the finances of a truly diverse range of clients.

Today, we have over 6,000 private tax clients and 1,500 trusts, consisting of high-net worth individuals, non-domiciled individuals, landed estates and professional practices. Engaging your talents to their full potential is important to us, so whatever area you choose to specialise in, we've got a variety of opportunities for you.

## YOUR PROFESSIONAL QUALIFICATION:

Full study support for the Associate Chartered Accountant (ACA) or Association of Taxation Technicians (ATT), Chartered Taxation Adviser (CTA) and joint CTA/ACA qualifications.



# NATASHA BENNETT

ASSURANCE & BUSINESS SERVICES

The grad scheme is really varied, with your time split between college, training and client work. As Smith & Williamson deals with smaller companies, you get the chance to work on a wide range of clients in different business sectors. It also means you take on roles of responsibility fairly quickly. I recently completed the audit of a small AIM listed group and was able to see it through from the planning stage to the closing meeting, which I don't think I would have been able to do at a larger firm.

Another thing I like is that the work/life balance is really good. You rarely work crazy hours. The office is relaxed and there are regular socials throughout the year, as well as sports teams to get involved in.

If you want to stand out during the application process, make sure you've got good work experience and activities on your CV. It's not all about your degree mark.

JOINED SEPTEMBER 2014

DEGREE:  
CHEMISTRY MSCI

BUT MORE:  
I'M A QUALIFIED  
SCUBA DIVER

# ASHLEA HOWELL

BUSINESS TAX

I wanted to join a large professional services firm because they tend to have the best training programmes and the most interesting work. Of those firms in the UK, Smith & Williamson is the most prestigious while still retaining the feel of a smaller firm because the work is centred around the client rather than around a task or project. The firm has much better hours and far less pressure than many other firms of the same calibre, but the same quality of work and clients.

In contrast to other firms, the Smith & Williamson graduate scheme moves through the training qualifications much more quickly, which has allowed me to do more advanced work earlier on. There is also a strong connection between the different departments, at all levels between trainee and partner, so although I work in Business Tax I have worked alongside accountants, insolvency practitioners and personal tax managers. The people here are approachable, willing to take the time to teach you — and have a great sense of humour!

JOINED SEPTEMBER 2015

DEGREE:  
BUSINESS ECONOMICS  
& BUSINESS STRATEGY

BUT MORE:  
I'VE BEEN PRACTICING  
BALLET SINCE I WAS FIVE

## TOM DANAHER

INVESTMENT MANAGEMENT

There are two main strengths to the firm's approach to graduate development. Firstly, it shows a commitment to training graduates to the highest industry standards. For instance, within six months of joining, the Investment graduates complete the Investment Advice Diploma. I'm now working towards the CISI Chartered Wealth Manager qualification, and I have an option to complete the CFA too.

Secondly, the firm recognises the importance of learning how the business operates in the early stages of your career. The rotational programme allows Investment graduates to understand the investment process and forge relationships with support staff, which will be hugely beneficial in the long term.

I also like that there's a really friendly atmosphere in the office and a very healthy social scene outside of it. We have a great location in the City, with plenty of bars and restaurants nearby. I've also spent time in our Belfast and Glasgow regional offices, and our teams there have been just as welcoming.

**JOINED SEPTEMBER 2015**

DEGREE:

**POLITICS, PHILOSOPHY  
& ECONOMICS**

BUT MORE:

**I'M A SEMI-PROFESSIONAL  
FOOTBALL REFEREE**

## RHYS WESTALL

PRIVATE CLIENT TAX SERVICES

I joined Smith & Williamson because it's different from other accounting firms. For starters, it has a large investment management wing, which means we have a different client base and more potential opportunities for career development. I also liked the size. We're not a Big Four where you're likely to be just one of a huge number of other graduates. At the same time though, we're not a small local accountancy firm where career opportunities may be more limited.

For me, the best thing about working here is the responsibility. On my first day in the office I knew very little about tax, yet I was given an allocation of 150 clients to look after on a day-to-day basis. It seemed daunting at first, but the amount you learn from having this sort of responsibility is amazing.

There's also a really good atmosphere. Everyone is incredibly friendly and approachable, including partners. You can ask anyone for help with something and they will stop what they're doing and offer you assistance.

**JOINED SEPTEMBER 2015**

DEGREE:

**BUSINESS ECONOMICS**

BUT MORE:

**I ROW TWICE A DAY,  
SIX DAYS A WEEK**

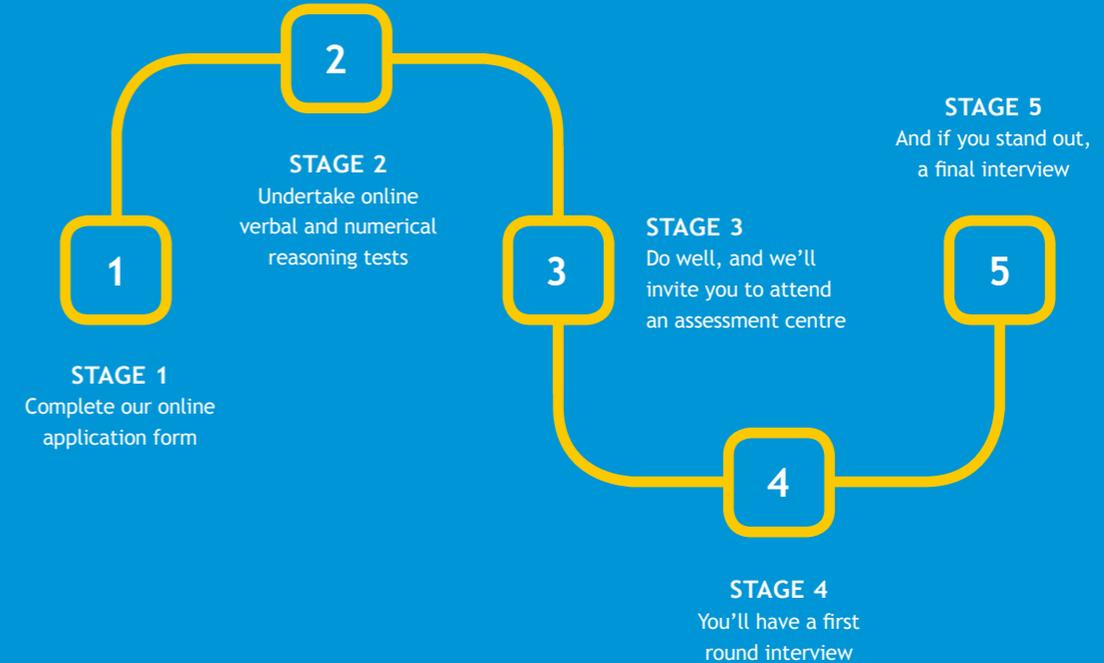
## Entry requirements

As a firm, our ability to deliver the quality of advice and service our clients expect relies on the quality of our people. With this in mind, we look for a minimum 2:1 undergraduate degree, or equivalent. You don't need a particular degree; it's your sharp eye for detail and desire to excel that interest us most. Prove you're hardworking and have a passion for learning, and you'll impress us. In addition, you'll need a B grade or above in English Language and Maths at GCSE or equivalent, and at least 280-300 UCAS points (112-116 post-2017) in your top three A-levels or the equivalent (excluding General Studies).

## Application process

We've designed our application process to be rigorous yet fair. It's important to establish that we're the right fit for each other. So, the first step you should take in this process is research. Take the opportunity to find out as much about our business, culture and approach to work as you can. This will help you to decide if we're right for you.

If you think we are, your application form will be the first chance for you to demonstrate this. Our advice is to be yourself.





@SmithWilliamson



Smith & Williamson

[smithandwilliamsontrainees.co.uk](http://smithandwilliamsontrainees.co.uk)