WILLIAM DAY

Senior Investment Director & Team Head
Practitioner of the IOB

Rathbones Investment Management

RATHBONES

“Rathbones Group provides comprehensive wealth management, investment management, and financial planning services for individuals, families, charities and corporations.

They focus on bespoke, discretionary investment portfolios, tax-efficient planning, and sustainable investing - all aimed at long-term capital growth and income needs.”

INVESTMENT DIRECTOR

“An Investment Director manages investment portfolios, sources new deals, and drives capital growth, acting as a senior leader in private equity, venture capital, or asset management firms.

They oversee the full investment lifecycle - from sourcing and due diligence to negotiation, closing, and exiting. They also mentor teams and manage relationships with portfolio company management.”

QUALIFICATIONS, EXPERIENCE AND SKILLS

What qualifications do you need to work in your field?
When I finished University I thought I would never need to take another exam again. How wrong was I! I have postgraduate qualifications to “level 7” to ensure that im allowed to do my job. I have to do 35 hours a year CPD (Continuing Professional Development) to stay qualified in the UK, and 15 more to remain qualified in Ireland!

What experience, outside of the classroom, is also required?
I work directly with wealthy people who are my clients – experience in that field can be taught only gained over time working in my industry.

What are the key skills to possess or work towards for this role?
Social skills are important – but I suspect I have taught myself most of them, coming from a low base!

DAY-TO-DAY

What does your 'boring' day look like?
My work diary will tell you that no day is boring – it's a pretty busy and varied life working with colleagues and clients, attending research meetings and working on a computer – and talking to people face to face.

What makes you feel like you've had a 'win' at the end of the week?
A "win" is not just winning a new client, but helping clients and looking after them.

How much of your time is spent working with people versus working alone?
Its probably 60/40 – quite a contrast between solitary work and then action packed face to face.

UNEXPECTED AND FUTURE

What is the one thing about your job that surprised you the most when you started?
Apart from the exams...that its ok and even vital for a job to be FUN! You spend a lot of time doing it so no matter what the pay you had better really enjoy it!

How has your role changed since you started?
As I have worked my way up I now have responsibility for looking after lots of other people, not just myself. That's not fun if it goes wrong.

Where do you think your role and field are going in the next 5-10 years?
AI will have some large effect on our field, but there will always be a role for sensible human beings within that. I have to make sure that I don't end up doing more management but continue to spend time with my clients as human beings as that's the most rewarding bit.