



December 2025

Job Description

Title: HR Business Partner

Company: Wren Sterling Financial Planning Limited

Reports To: Director of HR

Company Overview

Wren Sterling is a UK-wide independent financial advice business working with over 16,000 clients. In complex markets that change frequently, we help our Workplace and Private clients make the right financial choices to make them feel confident and in control of their finances.

In the Private Client market, we specialise in all aspects of pensions, investments, retirement planning, estate planning and tax planning. For our Workplace clients we are experts in workplace pensions, employee benefits, and workplace wellbeing strategies, helping organisations and their employees take the biggest financial decisions.

We're a fast-growing business that is committed to giving our employees a fulfilling experience where everyone can grow professionally in a supportive environment. Our values guide everything we do, from how we support our colleagues to how we serve our clients. Discover more about our four values on our website:

- Wren Sterling Knows
- Wren Sterling Cares
- Wren Sterling Acts
- Wren Sterling Delivers

Role Overview

The HR Business Partner (HRBP) plays a pivotal role in shaping and delivering the People Strategy across the business. Partnering with assigned senior leaders, the role is responsible for providing strategic and operational HR support, ensuring alignment with business objectives while enhancing Wren Sterling's culture, regulatory compliance and employee experience.

The HRBP will lead on complex employee relations issues, organisational change programmes, talent management, workforce planning, acquisitions/TUPE, leadership development, and reward initiatives. They will act as a strategic partner to senior leaders, using insight and expertise to influence decision-making, strengthen organisational capability, and drive culture, engagement



and inclusion. The role is critical in supporting Wren Sterling’s ambition to be an employer of choice within the UK financial planning sector.

Role Competencies

| | Influencer | Achiever | Developer |
|------------------|------------|----------|-----------|
| Business Ethics | | X | |
| Communication | X | | |
| Organisation | | X | |
| Customer Service | | X | |
| Leadership | X | | |
| Teamwork | | X | |
| Technology | | X | |
| Expertise | X | | |

Qualifications

Essential:

- GCSEs including Maths and English (or equivalent)
- CIPD Level 5 Diploma (or equivalent), working towards Level 7 preferred

Desirable:

- Degree in Business, HR, or related discipline
- Coaching qualification or leadership development accreditation

Principle Objectives & Responsibilities

Principle Objectives and Responsibilities include the following, although other objectives may be assigned:

Strategic Business Partnering

- Act as a trusted partner to senior leaders, providing insight-driven HR support.
- Support leaders to build high-performance teams through effective coaching, constructive challenge and role-model behaviours.
- Support the design and delivery of organisational people plans aligned to business goals.
- Analyse people data to identify trends, risks and opportunities, and provide proactive recommendations to senior leaders.

Employee Relations

- Lead and advise managers through ER cases including performance, conduct, grievance, and capability matters.



- Provide coaching to managers to increase leadership capability and consistency of people practices. Ensure all activity aligns with the ACAS Code of Practice and Financial Services regulatory obligations.

Talent, Performance & Organisational Development

- Lead annual performance and talent management cycles, including succession planning and calibration.
- Identify skills gaps and partner with managers to create development plans.
- Support leadership development programmes and coaching.

Change Management & Organisational Design

- Lead people elements of organisational change, including restructures, redundancy consultations, and cultural integration activities.
- Provide expert advice on role design, workforce planning and future capability needs.
- Identify opportunities to streamline HR processes and improve the colleague experience through continuous improvement initiatives.

Acquisitions & TUPE

- Support due diligence and lead post-acquisition integration plans.
- Manage end-to-end TUPE processes, ensuring consultations meet with regulatory compliance, communication and positive employee experience.

Reward & Recognition

- Partner with the Director of HR on company-wide reward initiatives including salary benchmarking, annual salary review, and benefit improvements.
- Provide guidance to managers on pay, recognition and retention solutions.

Recruitment & Resourcing

- Oversee recruitment strategies for key roles, ensuring quality, diversity, and organisational fit.
- Directly manage the recruitment agency Preferred Supplier List, to drive cost efficiencies and value for money.
- Lead on specific recruitment projects such as direct sourcing, emerging talent programmes, internships and work placement opportunities.
- Clearly articulate the Wren Sterling Employee Value Proposition, supporting employer branding initiatives to strengthen Wren Sterling's position as an employer of choice.

Policy, Compliance & Governance

- Lead policy development and ensure alignment with employment law and industry-specific regulatory requirements.
- Maintain high standards of data protection and ensure accurate employee records.

General Responsibilities

- Produce MI reports and insight to support senior decision-making.
- Coach and support the HR Assistant/HR Apprentice in completing HR administrative duties, ensuring high standards of accuracy, compliance and timely delivery.
- Promote equality, diversity and inclusion in all working practices.
- Ensure compliance with Health & Safety and all internal policies.
- Completion of other reasonable duties, as defined by the Senior Management Team.
- Promote professional behaviour by demonstrating courtesy and respect to all colleagues whilst always following the Company's equality and diversity policy.



Knowledge Required

- Extensive experience in a generalist HR role, with proven HRBP experience in a regulated environment.
- Strong knowledge of UK employment law and Financial Services HR obligations.
- TUPE expertise and experience supporting mergers & acquisitions.
- Understanding of data protection legislation relating to HR.
- Practical understanding of payroll and benefits processes.

Skills Required

Essential skills:

- IT literate, including all Microsoft Packages
- Strong stakeholder management and influencing skills
- Excellent written and verbal communication
- Ability to analyse HR data and propose actionable insights
- High levels of emotional intelligence and resilience
- Ability to manage multiple priorities in a fast-paced environment
- Strong problem-solving and conflict management skills
- Implementation of HR Systems
- Coaching and Facilitation skills
- Strong analytical skills
- Self-starter with the ability to identify problems and find solutions
- Calm under pressure

Desirable Skills:

- Proficient in using data reporting tools (PowerBI)

Key performance Indicators

The performance of the staff member assigned to this job role function shall be measured by:

- Individual / Team meets financial targets, KPIs and SLAs
- Internal and external customer satisfaction measures
- Strategic impact on business unit performance and people outcomes
- Leadership feedback and stakeholder satisfaction
- Effective management of ER cases and compliance adherence
- Delivery of people plans and change projects
- Adherence to all company policies and procedures
- Adherence to compliance and other legal regulatory processes

The above statements are intended to describe the general nature and level of work being performed by the person taking the role of this job. They are not intended to be an exhaustive list of all responsibilities and activities required of the position.

