



APPOINTED LTD

FINANCIAL RECRUITMENT SPECIALIST

My Client

Chartered financial planners dealing with high net worth clients with a fantastic reputation for the honest and professional advice they provide to the South. A highly professional team, with many home grown advisers, with years of technical experience between them.

The Role

- Providing technical support and recommendations to Financial Advisers
- Preparing recommendation reports and client sign up packs, covering IHT Planning, CGT calculations, VCT/BR products, top slicing calculations, Trusts, DB pension transfers, ISAs, General Investment Accounts, Onshore/Offshore Investment Bonds
- Attending client and product provider meetings
- Processing new business to completion and updating and maintaining our back-office system - Intelligent office (Intelliflo)
- Ensuring correspondence and telephone calls are dealt with in a professional, speedy manner.
- Liaising with the Compliance Manager, resolving compliance issues
- Builds and fosters relationships, communicating effectively at all levels, to ensure consistent responses
- Interpreting information and statistical data

The Candidate

Candidates must have worked as a paraplanner, ideally within a whole of market setup and have achieved or be a couple of exams away from completing the Level 4 Diploma in Financial Planning. You will be familiar with Intelligent Office and abrdn Wrap Platform. You will be a confident and clear communicator, both written and verbally alongside excellent attention to detail.

The Package

Paying upto £35,000 this position is a mix between office and home based working 37.5 hours Monday to Friday with a core working day 10.00am-4.00pm with a start/finish between 8.00am-6.00pm. You will receive 5 weeks plus 8 bank holidays, Pension 3% of gross salary, Private Medical Insurance after 6 months service and Annual discretionary bonus.

Please submit a application for further information or contact Chez Dunning directly.