https://threesixtyselection.com/job/paraplanner-financial-planning-sandbach-j1158

Paraplanner (J1158)

Employment Type
Full Time

Beginning of employment
ASAP

Duration of employment
Permanent

Industry
Financial Planning

Working Hours
Full Time

Base Salary
£ 26,000 - £ 32,000

Date posted
September 30, 2020

Valid through
31.10.2020

Description

Paraplanner- Sandbach (J1158)

IFA Practice in Sandbach are recruiting for a Paraplanner to work alongside 3 Advisers to support the smooth running of this professional IFA practice.

The firm currently employ 23 staff across two offices, they have a very close team and a professional yet very friendly atmosphere. The team are all well qualified and experienced, and they are knowledgeable with regards to compliance and what is expected of them.

This is a technical paraplanning support role, and is pivotal to the high quality service that the business prides its self on.

Responsibilities

- To complete a number of non-client facing tasks involved in preparing and administrating a Financial Plan and / or Report for clients.
- Keep up-to-date with new product, technical or legislative changes within the marketplace.
- Comply at all times with the firm’s Compliance; Training & Competence; Complaints and Data Security policies / procedures.
- To ensure that the firm’s clients are treated fairly at all times.
- To work as part of a team alongside the firm’s advisers and administrators to provide clients with a professional ongoing Financial Planning experience.
- To prepare and maintain client files
- Once in receipt of a completed ‘factfind’, collate all the relevant quantitative detailed information required to compile a financial services report.
- Check all paperwork / information is available to ensure that the client file meets the FCA’s rules and requirements.
- Discuss the client’s needs and objectives with the relevant adviser.
- To prepare recommendations.
- Undertake research to identify suitable solutions to meet the client’s needs and objectives.
- Prepare information for analysis by the adviser.
- If applicable, liaise with the client’s legal and tax advisers.
- Prepare draft recommendation report.
- Discuss draft recommendation report with the relevant adviser. Obtain ‘sign-off’ by the relevant adviser.
- To implement recommendations.
- Prepare suitability reports in accordance with the agreed recommendations.
- Ensure all compliance paperwork is in order.
- If relevant, act on any changes made by the client.
- Implement the chosen / agreed investment strategies.
- To undertake client reviews
- Act as main point of contact and deal effectively with queries from clients and other parties.
- Establish and build strong relationships with clients.

- If required, attend client meetings with adviser.
- Organise future planning meetings with clients, in accordance with agree timescales.
- Review investment portfolio, asset allocation, risk profile etc.

Qualifications

- CII/Level 4 Diploma or close to achieving

Experience

- Excellent inter-personal skills, both written and verbal.
- Excellent report writing skills.
- Accurate with good attention to detail.
- Time management.
- Detailed knowledge of the FCA's rules and requirements.
- Detailed knowledge of the FCA's and the firm's record keeping requirements.
- Broad knowledge of the financial services sector.
- High level of technical knowledge.

Job Benefits

- £26,000 – £32,000
- Company Pension
- Qualifications supported

Contacts

For further information please use the details below, or apply in confidence using the 'Apply Now' button.

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View my profile on Linked in