https://threesixtyselection.com/job/ifa-financial-planning-sandbach-j1157

IFA ~ 55k (J1157)

Employment Type
Full Time

Beginning of employment
ASAP

Duration of employment
Permanent

Industry
Financial Planning

Working Hours
Full Time (Flexible start/finish)

Base Salary
£ 50,000 - £ 55,000

Date posted
September 1, 2020

Valid through
01.10.2020

Description

Leading UK Personal Injury Financial Planning firm – a company dedicated to providing independent advice to recipients of personal injury damages.

This is a key role in the business – the aim being to gradually take over an established client bank. The firm of 30+ employees are independently owned, financially sound and have an ever increasing client base – being effectively managed by a very experienced team, including advisers, compliance, admin and paraplanners.

This position will pay a market leading guaranteed salary, rather than being a commissioned role, which would not reflect the core values of the firm and encourage best practice with regards to client care. The team are extremely loyal to their company's reputation in putting their clients needs before profit, and building long term relationships. The successful applicant to this role will be measured on quality of advice and client retention. There are no new business, or existing financial targets. We are not looking for a sales person, we are looking for a committed, professional, empathetic individual who understands the challenges their clients face, and whom will work proudly in their clients best interest. You will be immersed in the world of personal injury including the pre-settlement/litigation side, although your main focus will be on post settlement client care.

Responsibilities

- Face to face client reviews to understand their needs, aims and objectives for the future
- Writing reports, with paraplanning support and full administration and compliance support.
- Maximising client entitlement to state benefits and Local Authority funding
- Maintaining client entitlement to means-tested benefits into the future
- Implementing appropriate investments and deposits Tailoring clients finances to their ever-changing needs and wishes for the future.

Qualifications

Level 4 diploma and CF30

Experience

- You must currently be a Financial Adviser and hold CF30 Personal Injury financial planning experience desirable but not essential.

Job Benefits

- £50,000 – £55,000
- Company Pension
- PMI
- 30 days holiday (plus bank holidays)
- Car Allowance

- 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 LinkedIn