

REQUIREMENTS

- Communicate effectively with people at all levels
- High level of commitment to their role and the Company
- Maintain high standards of work and a positive attitude at all times
- Willingness to support team members
- Understanding of Company direction and goals
- Commercial awareness of targets, business focus, and sales campaigns in progress
- Retain a knowledge of products arranged by the Company
- High level of customer service and a proactive approach in using Company systems and procedures
- Proven organisation and administrative skills
- Good knowledge of compliance and regulatory requirements
- Professional business manner at all times
- Relevant approved qualification **(essential)**
- Detailed knowledge of FCA and the firm's record keeping requirements **(essential)**

RESPONSIBILITIES

- Keep up to date with new product, technical or legislative changes within the marketplace
- Always comply with the Compliance and Training and Competence Procedures of the firm
- Always maintain a Statement of Professional Standing from an approved Accredited Body
- Adhere to the cross-cutting rules and act in the spirit of the Consumer Duty to support the achievement of good Consumer Outcomes
- Identify and contact potential clients
- Gather sufficient client information and identify client needs
- Analyse information gathered and undertake sufficient research to make suitable recommendations
- Complete all supporting documentation in an accurate manner
- Attain and maintain competent status as defined by FCA and the firm
- Maintain performance standards in accordance with those outlined in the Key Performance Indicators (KPIs) section of the Training and Competence procedures
- Self-assessment and feedback, identify Continuing Professional Development (CPD) needs to maintain and enhance Competent status and undertake appropriate activity to meet those needs.
- Minimum of 35 hours per annum of CPD is required, 21 hours of which must fall into the definition of Structured CPD
- Maintenance of own Training and Competence record
- Maintenance of own CPD records
- Ongoing awareness of Retainer Client service levels
- Gain referrals wherever possible

WHAT WE OFFER

- Competitive Salary
- Generous Employee Benefits Plan
- Pension contributions matched up to 5%
- 35-hour week with 20 days holiday plus bank holidays (plus annual increase up to 4 years)
- Birthday and Christmas/New Year Closure off
- Flexible and Hybrid Working - 4pm finish Fridays
- On-site Mental Health First Aiders
- Regular team building activities
- Personal training budget for CI Qualification

Interested applicants please email a CV to Pippa Ellis pellis@beaconwealth.co.uk