

Adviser Assistant to the Managing Director

About Us

Beacon Wealth Management is looking for an individual who is diploma qualified to join our well-established Chartered Financial Planning firm.

Based in Kimbolton, Cambridgeshire, this role would suit an individual who wants to progress, to join a firm in an employed capacity.

Role Overview

The Adviser will work closely with the Managing Director (MD) to provide executive support, research and client service assistance. This role is designed as a career development pathway; the successful candidate will initially focus on supporting the MD with co-ordination, advisory research before gradually taking on responsibility for managing a portfolio of the MD's clients.

This is a unique opportunity for a motivated, analytical and client-focused professional to gain direct exposure to high-level strategy and client engagement.

What you will be doing

- Support the MD with providing tailored holistic financial planning solutions to clients, gathering and analysing information to identify their needs and make suitable recommendations.
- Keep up-to-date with new product, technical and legislative changes.
- Maintain expected performance standards and comply with the Compliance, Training and Competence procedures of the firm.
- Support consumer outcomes at all times, acting in the spirit of Consumer Duty and adhering to cross-cutting rules.
- Attain and maintain competent status as defined by the Financial Conduct Authority (FCA) and the firm, and a Statement of Professional Standing from an approved accredited body.
- Achieve a minimum of 35 hours of CPD per year (21 of which defined as Structured CPD).

- Maintain own Training and Competence Record and CPD.
- Gain referrals from existing clients wherever possible.

About you

- Level 4 Diploma in Financial Planning (or equivalent).
- Strong knowledge of FCA compliance and regulatory requirements.
- Work and communicate effectively with colleagues, clients and stakeholders.
- A commercial focus to meet targets in line with the Company's direction.
- Maintain a high standard of professionalism, organisation and administration in your duties.

What we offer

- Competitive Salary
- Generous Employee Benefits Plan
- Pension contributions matched up to 5%
- 35-hour week with a 4pm finish on Fridays
- 20 days holiday (increasing 1 day per year up to a maximum of 23) plus Bank Holidays, 3 days at Christmas, and your Birthday off
- Flexible and Hybrid working available
- Regular team-building activities

How to apply

Please send your CV to Pippa Ellis at pellis@beaconwealth.co.uk