

Paraplanner

Purpose of the Role

Reporting to the Office Manager, the Paraplanner will provide support and co-ordinate their work ensuring the provision of a first class support service for the clients of the Company.

The Paraplanner will additionally provide a high quality, business focused and cost effect admin support to an Adviser and to the clients of the Company. They will be required to demonstrate a proactive approach in all areas of their work.

The Person

The Paraplanner should possess the following;

- The capability to communicate effectively with people at all levels.
- A high level of commitment to their role and the Company
- The capability to maintain high standards of work and a positive attitude at all times
- The capability to show empathy towards other team members
- An understanding of the Company's direction and goals and a commercial awareness of the targets, business focus and sales campaigns in progress
- The capability to retain a knowledge of products arranged by the Company
- A high level of customer service and a proactive approach to the use of the Company's systems and procedures
- Proven organisation and administrative skills
- A good knowledge of compliance and regulatory requirements
- A professional business manner at all times

About you

- Level 4 Diploma in Financial Planning (or equivalent)
- Experience in paraplanning
- Strong knowledge of FCA regulations and industry best practices
- Attention to detail and excellent analytical skills

Responsibilities

The core tasks of the role are as follows;

Support for the Adviser

- Analysing data and using research tools to provide solutions to meet Client needs and objectives
- Research best products from whole of the market and providing supporting records for research undertaken
- Interpreting data obtained by Advisers during client meetings
- Responsibility for obtaining outstanding information where necessary
- Carrying out all tasks in a manner consistent with compliance procedures and requirements
- Participation at Monthly Staff/Consultant meeting
- Preparing quotes using all tools available
- Suitability letter construction
- Processing New Business
- Other ad hoc duties as required

Other areas of responsibility

- Keep up to date with all relevant product, legislative and technical changes as required
- Maintenance of own Training and Competence record
- Monitoring of Provider online access
- Ongoing awareness of Retainer Client service levels
- Training of other team members

This list is not exhaustive and you may be required to perform other duties as assigned by management.

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

How to apply

Please send your CV to Alex Larkins at alarkins@beaconwealth.co.uk