

# Independent Financial Adviser (Employee Benefits)

## About Us

Beacon Wealth Management is looking for an Independent Financial Adviser (IFA) to join our well-established Chartered Financial Planning firm.

Based in Kimbolton, Cambridgeshire, this role would suit an experienced IFA looking to join a firm in an employed capacity, focussed on providing financial planning and Employee Benefits packages to business clients.

## Role Overview

You will provide financial planning solutions to both SME employers and their employees, through Group Schemes and Employee Benefits packages that include – but are not limited to - pensions, protection, wellbeing and other benefits.

## What you will be doing

- Provide 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](mailto:pellis@beaconwealth.co.uk)