

Independent Financial Adviser

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.

Role Overview

You will provide financial planning solutions to clients, tailored to their needs. You will develop your own clients whilst supporting an existing bank of clients. Support will be provided by a back-office team that includes paraplanners and administrators, enabling you to focus on delivering strong outcomes for your clients.

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.
- Grow your client bank through activities including referrals, networking and introducer relationships
- 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