

Join Our Team as a Financial Adviser!

About (insert company name):

We are a leading financial planning firm dedicated to empowering our clients to achieve their financial goals through personalised strategies and exceptional service. With a strong commitment to integrity and innovation, we foster a collaborative environment where growth and success thrive.

Role Overview:

As a Financial Adviser with us, you will provide expert financial guidance to our diverse client base, helping them navigate complex financial decisions and achieve their long-term objectives. You'll develop customised financial plans, recommend suitable investments, and build lasting client relationships based on trust and professionalism.

Day-to-Day Duties:

- Conduct comprehensive financial assessments and analyses for clients.
- Develop and present personalised financial plans aligned with client goals.
- Recommend appropriate investment strategies and products based on client needs.
- Monitor and review client portfolios, making adjustments as necessary.
- Maintain regular communication with clients to provide ongoing support and advice.

What You Will Need:

- Proven experience as a financial adviser or in a similar role in the financial services industry.
- Strong knowledge of investment products, financial planning strategies, and regulatory requirements.
- Excellent communication and interpersonal skills with a client-centric approach.
- Relevant qualifications such as CFP, CFA, DipFA, DipPFS or equivalent.

Package & Benefits:

The successful applicant will receive a basic salary of £50,000-£60,000

Our benefits package includes:

- Bonus
- Pension
- Private Medical Insurance
- 25 days Annual leave (including or excluding bank holidays)
- Support with professional development and career advancement.
- Supportive team environment with mentorship and ongoing training.
- etc

Join Us:

If you are passionate about making a difference in clients' lives and thrive in a dynamic, client-focused environment, we invite you to apply. Visit [[Careers Portal Link](#)] to apply or email your CV to [[Email Address](#)].