

Seeking a Talented Paraplanner to Join Our Team!

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 Paraplanner, you will play a crucial role in our client service team, supporting Financial Advisers in preparing and implementing financial plans. Your responsibilities will include conducting research, analysing data, preparing reports, and ensuring compliance with regulatory requirements.

Day-to-Day Duties:

- Gather client financial information and conduct preliminary financial analyses.
- Assist in the preparation of financial planning recommendations and presentations.
- Prepare client review materials and follow-up documentation.
- Collaborate with Financial Advisers to ensure accurate and timely client service.
- Maintain client records and update financial planning software.

What You Will Need:

- Previous experience as a Paraplanner or similar role in a financial advisory firm.
- Strong knowledge of financial planning concepts, investment products, and compliance standards.
- Proficiency in financial planning software (e.g., Xplan, Voyant) and Microsoft Office Suite.
- Detail-oriented with excellent organisational and analytical skills.

Package & Benefits:

The successful applicant will receive a basic salary of £35,000-£40,000

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](#)].