

## Job Advertisement

### Job Title:

- Associate Financial Planner

### Job Description:

- As an Associate Financial Planner at Frazer James, you will work closely with the Lead Financial Planner to deliver exceptional client service. You will attend all client meetings alongside the Lead Financial Planner and be responsible for creating the client's financial plan. You will manage follow-up actions with the support team and prepare or coordinate all necessary documentation for each meeting.
- This is a remote role, designed to evolve into a primary Financial Planner position within 12-24 months, where you will take on your own clients and act as the lead adviser.

### Company Description:

- Frazer James is an award-winning independent financial advisory firm based in Bristol. Our dedicated team includes a Certified Financial Planner, Paraplanner, Client Administrator, and Operations Manager.
- We provide comprehensive financial planning services to around 90 client families, utilising advanced cash flow modelling software to fully engage clients in the planning process before considering financial products. Established in 2019, we have achieved significant organic growth and currently manage approximately £70 million in client assets.
- Due to this growth, we are excited to offer an opportunity for an Associate Financial Planner to join our dynamic team.

### Responsibilities:

- **Attend Client Meetings:** Join all client meetings alongside the Lead Financial Planner.
- **Create Financial Plans:** Develop comprehensive financial plans tailored to clients' needs.
- **Document Interactions:** Ensure thorough and accurate documentation of all client interactions.
- **Manage Follow-Up Actions:** Coordinate follow-up tasks with the support team to ensure timely completion.
- **Prepare Meeting Documentation:** Organise and prepare all necessary documentation for each client meeting.
- **Research and Analysis:** Conduct detailed technical research to support financial planning strategies, either independently or in collaboration with a Paraplanner.

- **Client Communication:** Maintain regular communication with clients to keep them informed and engaged.
- **Professional Development:** Stay updated with industry trends and continue professional education, aiming for Chartered status if not already acquired.
- **Transition to Lead Role:** Prepare to take on your own clients and evolve into a Lead Financial Planner role within 12-24 months.

## Requirements:

### Essential:

- **Location:** Based in the United Kingdom.
- **Remote Experience:** Previous experience working from home or in a remote role.
- **Industry Experience:** Minimum of 4 years of experience working in a financial advisory setting, preferably within an Independent Financial Adviser firm.
- **Role Experience:** Minimum of 2 years experience working as a Paraplanner or a Trainee/Associate Financial Adviser/Planner.
- **Qualifications:** Level 4/Diploma qualified minimum, with a commitment to progress towards Level 6 (Chartered).
- **Technical Skills:** Strong IT skills, including proficiency in Microsoft Office and financial planning software.
- **Attention to Detail:** Excellent organisational skills and meticulous attention to detail.
- **Communication:** Exceptional written and verbal communication skills.
- **Proactive Attitude:** Self-motivation and a proactive approach to personal learning and development.
- **Value Alignment:** Strong alignment with our core values of integrity, excellence, dependability, respect, and commercial acumen.

### Desirable:

- **Location Preference:** Proximity to the South West of the United Kingdom for occasional company meet-ups.
- **Chartered Status:** Chartered or Certified Financial Planner status has already been achieved.
- **Academic Background:** A solid academic foundation, preferably with a university degree.

## What We Offer:

- **Competitive Salary:** Commensurate with experience.
- **Performance Bonus:** Discretionary performance-based bonuses, paid twice yearly, totalling up to 10% of your annual salary.
- **Wellbeing Allowance:** 4% of salary, to spend as you choose.
- **Pension Scheme:** Matched company pension contributions up to 7% of your salary via salary sacrifice.
- **Annual Leave:** 32 days per year (including bank holidays), with additional days for long service and your birthday.
- **Flexible Working:** Remote working and flexible hours to support work-life balance.
- **Professional Development:** Opportunities for continuous professional growth and progression towards Chartered status.

## What We Offer:

If you are interested in this opportunity, please email your CV and a cover letter to [chris@frazerjames.co.uk](mailto:chris@frazerjames.co.uk)