

Paraplanner

We're looking for an exceptional and experienced Paraplanner (level 4 qualified and starting to work towards level 6, with 2 years' experience in a report writing/technical role).

The Company – Bespoke Advice Ltd

Founded in Worcester in 2014 but with a growing national footprint, we design and build financial plans for private individuals, business owners and corporate clients that fit perfectly with their unique requirements and needs. We focus on doing things properly and care passionately about the people we look after so, whether it's their retirement planning, their mortgage and property arrangements, or building and managing their wealth, our clients know that they can speak to us with confidence.

Bringing together a wealth of financial services experience, knowledge and best practice, we're a truly independent, full service, Chartered Financial Planner, dedicated to achieving and setting the highest industry standards. Committed to the wellbeing of our clients, staff, the environment and our community, we're building a sustainable advice business for today that will help shape the advice business of tomorrow.

We're growing, through organic, referral driven client attraction and acquisition, with most of our clients either finding us directly or through the recommendations of others; through the recruitment of high-quality employed and self-employed financial advisers keen to find a stable, supportive and dynamic home, where good governance and client centricity provide the firmest of foundations; and through the provision of an elegant "retirement pathway" for advisers seeking to leave the industry whilst securing an appropriate, empathetic succession plan for their clients.

As a B-Corp, we're proud of the business we're building and stand by the beliefs upon which it was set. We believe in integrity, authenticity and meaning, the importance of compassion, respect and kindness; in our responsibilities to others and the role of philanthropy, charity and harmony; in humility and dependability and in our power to empower people, helping them to live the best lives possible, always bespoke to their dreams and aspirations.

The Role

To support and assist in the functioning of our technical department and in the achievement and delivery of outstanding client outcomes, our business objectives and our regulatory obligations. Responsibilities will include, but not be limited to:

- Preparing review packs for client meetings within SLAs
- Writing client reports and recommendations letter within SLAs
- Preparing advice packs and application/nomination forms.
- Submitting Requests for Information to providers
- Cashflow planning.
- Research, using our tools and PROD
- Maintaining client records on IO and Sharepoint

The Requirements

You'll be an ambitious team player in possession of a growth mindset and a strong work ethic, have a keen eye for detail and be prepared to always go that extra mile for the good of the client and your colleagues. In addition, you'll also have a care for community, the world around us and a strong social and moral compass. This is predominantly an office-based role in Worcester. To be successful in this role you'll:

- Have a minimum of 2 years paraplanning/technical report writing financial services experience, which may have been in report writing/technical support and/or paraplanning.
- Ideally you will be at least level 4 qualified and possibly on the journey to becoming chartered.
- Possess an understanding of relevant regulation and legislation.
- Have an understanding of investment, retirement and protection products and attitude to risk.
- Must be able to demonstrate excellent oral and written communication skills and be an excellent time manager, able to work under pressure.
- Be articulate in terms of both industry language, tools and software systems.
- Share our belief in independence and the primacy of the client.
- Have experience working with Microsoft Word, Excel and Outlook.
- Demonstrate ongoing commitment to your own development.

The Reward

We believe in looking after our people and that the development of a fair, transparent and supportive working environment is essential to helping our team achieve our collective, and their individual goals. That's why all our people receive:

- 25 days paid holiday plus birthdays and bank holidays.
- Matched pension contribution up to 4% earnings.
- £50k Critical Illness Cover
- 4 x Death in Service
- Private medical Insurance.
- Additional support for training and development with costs of further qualifications covered by the business
- Carbon footprint off-setting.
- Two paid volunteering days per annum supported as part of our community support programme.

The successful applicant will, in addition, receive:

- **£35 - £40k per annum** (depending on qualifications and experience).