

EQ Investors

Role Profile - Corporate Pensions/Benefits Paraplanner

Role purpose

Production of technical reports and analysis for Consultants and Directors to present to clients and prospective clients. Centre of excellence for technical information and provider knowledge. Provision of regular updates for the Consultants and Directors so that they are kept abreast of the latest regulatory and legislative changes that may impact clients.

Principal accountabilities

- Create and maintain Client files – both electronically and in paper form
- Draft reports and co-ordinate data and research for client presentations and annual review meetings
- Keep existing standard reports updated
- Review the pension provider panel and ensure strong due diligence in provider selection
- Support Consultants with general pension, investigative, and technical research
- Manage the information and data flow from existing and potential new providers, staff data from client, and Consultant/Director meeting notes and establish a thorough understanding of the potential issues, solutions, and opportunities
- Form a strong working relationship with the Consultants/Directors through a high level of attention to detail, trust and reliable delivery by deadline dates
- Assist Consultants/Directors to deliver services specified in client fee engagements
- Prepare and assist with corporate client reviews and Governance meetings
- Prepare reports in response to tender requests in conjunction with the Directors
- Support team head through regular communications regarding the workload and processes
- Undertake ongoing technical training to build on existing technical knowledge and remain up to date

Technical knowledge and professional qualifications

- Strong analytical and numerical ability – must be able to analyse and interpret data, evaluate data and make recommendations based on data and market/technical knowledge
- Windows computer packages including Powerpoint, Word, Excel and strong knowledge of leading pension provider adviser systems
- Must have full Certificate in Financial Planning
- Ideally, be studying towards Diploma in Financial Planning
- Educated to at least A level/Higher standard
- Full understanding of the administration procedures for different business categories and ensure that they confirm to regulatory and Company standards
- All practices and disciplines in corporate pensions and investments and financial planning

- High level of product and service knowledge in all relevant areas of corporate pensions financial planning
- Anti-Money Laundering, including how to identify suspicious transactions/activities and how to report
- Current and future financial legislation and regulation and developments

Overarching obligations

- Achieve a high standard of ethical behaviour
- Comply with the Company's Treating Customers Fairly principles
- Comply with the Company's regulatory obligations (as set out in the Compliance Manual or ad hoc bulletins issued)
- Engage and deal with other parties subject to appropriate standards and in compliance with the requirements of The Bribery Act 2010

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