

Job Title: Paraplanner / Technical Specialist

Why choose Jane Smith Financial Planning

This is an excellent opportunity for an experienced paraplanner who thrives on complex client scenarios. We will encourage and support your development in specialist areas, improving your paraplanning skills. Development towards a Financial Planner role is always an option, but we value both roles equally and will support your development whatever path you choose.

We understand the right balance is needed when it comes to work and personal life. So, we do all we can to encourage a good work-life balance, currently working on a 60/40% split of office and home working, with potential for early Friday finishes. Couple this with a competitive salary and beneficial perks, we aim to ensure we support and are flexible for each other.

Benefits

- 30 days holiday (plus bank holidays)
- 3% employer pension contribution
- Health Cash back Scheme enrolment
- Training allowance / support towards qualifications
- Potential for bonus up to 10% of salary
- Hybrid working options
- Potential for Friday early finishes
- Applications from candidates wanting to work part-time or alternative hours will be considered

As a successful and award-winning Chartered Financial Planning Firm and Accredited Financial Planning Firm, our ethos is to provide an independent financial planning service. We aim to build relationships that last a lifetime with both our clients and our staff.

Jane Smith Financial Planning is looking for a Paraplanner / Technical Specialist, an individual that is enthusiastic, driven, extremely organised and thrives on a busy and challenging role keeping the best possible service and company standards.

The role of the Paraplanner is to deliver support to the Financial Planner, creating financial plans and creating cashflow models, writing reports and recommendations for our clients. Working within the paraplanning team, you will also work closely with the administration team.

You will be someone who has strong interpersonal skills and be able to apply your own judgement and experience. A minimum of 2 years' experience working as a qualified Paraplanner in a Financial Planning firm is essential. You will be at least Diploma level qualified. The individual must be willing to take ownership of their own personal development. However, there is a training and development programme available to assist you in working towards becoming a fully qualified Certified Financial Planner and Chartered Financial Planner, if you wish.

Purpose of Job:	To work alongside Financial Planner taking full responsibility for preparation and implementation of recommendations and Financial Plans (including cash flow forecasts), and ongoing reviews of client affairs. To keep up to date with technical and compliance issues and undertake any necessary research.
Reports to:	Business Manager
Salary Range:	£35,000 - £45,000 depending on experience
Working Hours:	9-5pm Monday – Friday (with flexibility for Friday midday finish), though applications from candidates wanting to work part-time or alternative hours will be considered
Start Date:	Immediate Start Available

Key Responsibilities & Accountabilities

Client servicing

- Establish and build strong relationships with clients and attend client meetings when required
- Provide a friendly and professional point of contact for clients and enquiries by phone, email and in person
- Respond to client technical enquiries

Supporting Administration Team

- Liaise with and support administration team to maintain accurate client records on the back-office system, platforms, and any other IT systems e.g., cashflow and risk profiler
- Check accuracy and completeness of new business documentation with administrators
- Check changes to clients' investments as necessary

Preparation of recommendations

- Identify and obtain information necessary to compile client recommendations / cash flow forecasts
- Identify areas for planning
- Carry out technical calculations
- Carry out due diligence on products, investments, providers etc
- Undertake research to identify suitable solutions to meet clients' needs
- Prepare information/comparisons for analysis by Financial Planner
- Liaise with clients' legal and tax advisers (if applicable)
- Consider current and future asset allocation for investment strategy in relation to client risk profiles and lifetime cash flows
- Produce clear, technically accurate, compliant, and concise Financial Plans and Suitability Reports as per business process
- Ensure that all recommendations and reports meet legal and regulatory requirements

Other

- General research related to all aspects of financial planning (e.g., product and platform research)
- Keep up to date with compliance changes, update templates and assist with annual compliance tasks
- Ensure CPD requirements are met and maintain up-to-date training records
- Assist your colleagues with technical enquiries and provide support when needed
- Other duties as directed by management

HOW TO APPLY

To apply please use the following link [Application Form](#) to provide a copy of your C.V along with a covering letter detailing why you would be the perfect addition to our team.

What happens next in our recruitment process

- Stage 1** Initial Telephone interview
- Stage 2** Face to Face Interview and Assessment
- Stage 3** Online Index Assessment
- Stage 4** Final Face to Face Interview

Also be aware that pre-employment background and credit checks will be required for this role.