**Senior Paraplanner (Eparaplan Connect)**

Aberdeen, Edinburgh, Glasgow (Hybrid)

Acumen Financial Planning

**Job Description**

Eparaplan Connect is an outsourced adviser support business that is affiliated by ownership with the large Quilter firm Lifetime Wealth management. We manage our own business and team as well as the admin and paraplanning team at Lifetime. What this does mean is that we have a direct route to advising for our paraplanners who wish to advise and for those who don’t, opportunities to specialise in many areas.

We are looking for a senior paraplanner to come in and WOW us! You need to be technical and know your stuff with financial advice, taxation, trusts, EIS, VCT, DB etc, with an ability to train your team of paraplanners and develop administrators into new paraplanners.

You will need to know how to manage large workloads, delegating cases to paraplanners and organising information when needed to be collated with the admin team.

You will be working across 2 businesses who work as one - you will need a good head for multi-tasking and staying focussed.

**This varied role will involve:**

This is a role with responsibility and autonomy, so if you are the following, we want to hear from you:

* Experienced paraplanner, with some industry qualifications
* Process manager – we have oodles of processes to create, review and manage
* People manager – able to assign cases, check work and coach junior paraplanners to improve their quality and careers
* Flexible – can you cope with a variety of file types, processes, systems and standards, and can you reprioritise every day?
* Problem solver – we deal with imperfection, and we love it! Report writing is a skill, solving problems and helping clients is something else!
* Multi-tasker – can you write reports, gather information from clients and coach your colleagues at (almost) the same time?
* Knows how to Prioritise – always aware of deadlines and customer & business needs
* Effective communicator – build relationships and trust, and get what you need
* Commercially minded – can you be accurate and efficient?
* Team player – happy to pick up a colleague’s work, or do the admin if needed
* Have a sense of humour and don’t take yourself too seriously

**Required skills**

* Excellent customer service skills
* Strong written communication skills
* Experience working in a financial services environment, ideally part DipPFS qualified, but not essential.
* Maintain a strong professional relationship with colleagues to ensure an effective and positive working environment
* Maintain a relevant level of CPD

**Benefits**

* + Salary banding of £40-48k.
  + Opportunities for career progression (inc. paraplanning, management, compliance, advice)
  + Funded exam support plus 2 days off for revision and the exam
  + Birthday voucher & cake (sometimes with cream!)
  + Death in Service
  + Pension – Automatically enrolled into our Workplace Pension after completion of 6 months of service with a 3% Employer Contribution and 5% Employee Contribution
  + A great holiday package, with Xmas shutdown in addition
  + 4 x Team event days out of office
  + Evening team events
  + Cycle to Work Scheme
  + Tech purchase scheme
  + On site free parking
  + Office tea and coffee with snacks
  + Weekly Yoga session
  + EAP
  + Team well-being check-in system
  + Early closure on Fridays
  + Free comfy uniform, teeshirts, hoodies etc.
  + Hybrid working
  + Flexible working

**How to apply**

We offer a minimum salary of £40k with a maximum in this banding of £48k. Further pay rises would occur when moving up to a paraplanning management role.

Please apply to [humanresources@eparaplan.co.uk](mailto:humanresources@eparaplan.co.uk) with your CV, location and desired working pattern and salary.

We are proud to be an equal opportunity employer and are committed to recruiting and developing a diverse team, inclusive of race, religion, age, gender, sexual orientation, and disability. We recognise menopause and endometriosis and make provisions for these as well as neurodiversity.

Prior to joining we ask if there are any provision we can put in place, where possible and reasonable, to make you as comfortable as possible in a working environment, both in office and at home.