

## Paraplanner – Blue Wealth, Westbury-on-Trym, Bristol

The opportunity for an experienced career Paraplanner to join a growing life centred financial planning firm, in our award-winning Paraplanning team. In the first instance, please send your CV to [nathan.jones@bluewealth.co.uk](mailto:nathan.jones@bluewealth.co.uk)

### Responsibilities

- Working within our award-winning Paraplanning team, supporting our Financial Planners with the delivery of comprehensive financial planning to our clients
- Undertake technical research, prepare financial planning recommendations, and implement agreed plans
- Liaising with the planning team, clients, and providers where necessary
- Analysis of personal client data and preparation of financial plans (including cashflow forecasting)
- Analysis of products and underlying investment strategies
- File preparation for Annual Planning Meeting's with clients and action any remedial work required following review
- Maintaining client files
- Ensure all regulatory and compliance standards are achieved
- Assisting and contributing to the ongoing development of best practice for processes within the firm, to achieve better client outcomes
- Ensuring the best interests of our clients are at the heart of everything you do.

### Skills & Experience

- As a minimum, at least 2 years' experience in a Paraplanning role
- A high level of technical knowledge and good knowledge and experience in all areas of financial planning
- Minimum Diploma in Financial Planning (or very close to achieving)
- Competent in writing technical suitability reports and able to assimilate complex technical information into a format that is understandable for clients
- Competent user of Microsoft Office applications Word, Excel, Outlook & Teams
- Highly organised, analytical and can prioritise workloads to achieve deadlines
- A positive attitude and able to work efficiently with minimum supervision, or as part of the team as required
- Experience in using the following would be beneficial:
  - FE Analytics
  - Cashflow forecasting software (Voyant would be preferable, but training can be provided)
- Excellent communication skills, both verbal and written

3 Westbury Mews | Westbury-On-Trym | Bristol | BS9 3QA  
0117 332 0230 | [www.bluewealth.co.uk](http://www.bluewealth.co.uk) | [hello@bluewealth.co.uk](mailto:hello@bluewealth.co.uk)

## Benefits

- Competitive Salary iro £35,000 - £45,000, but will be dependent on experience and open to discussions.
- Discretionary bonus of up to 12%
- 26 days holiday
- Workplace Pension with an 8% non-contributory employer contribution
- Death-in-service scheme
- Group Income Protection scheme
- Group Health Cash Plan
- The opportunity to join a friendly, established, forward thinking business in an open working environment and a supportive team that focuses on learning and development
- Exam Support and training costs covered

No recruiters please.



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