



Trainee Independent Financial Advisor

Full time, Permanent Position – 37 hours per week

Location: Jerroms, Blythe Valley Park, Solihull, B90 8AH

Salary: £35,000-£45,000 (with ongoing earning potential linked to client-generated revenue upon sign off)

Jerroms Financial Planning is a fast-growing Independent Financial Advisory firm based in the business hub of Blythe Valley Business Park. Over the past couple of years, our firm has seen significant growth in the number of families we look after and subsequently the funds we manage, now having £140 million of Funds Under Management.

We are currently seeking an existing paraplanner/trainee advisor who is ideally already at diploma level or towards the final stages of qualification. This individual should aim to transition into an advisory role within the next 6 to 12 months, with ample support, development and feedback provided to foster your development to becoming an Independent Financial Adviser.

This role will include:

- Initially, participate in new client and annual planning meetings alongside the managing director/advisor. During this phase, assume paraplanning responsibilities, including conducting research and drafting meeting notes to showcase competence and understanding.
- Collaborate seamlessly with the administration team to ensure efficient implementation of agreed actions.
- Progress towards competent adviser status by collaborating with the managing director by holding compliant new client and annual planning meetings.
- Foster client relationships and explore opportunities for business development within the Jerroms group.

Skills required:

- Experience with adviser platforms and software such as FE Analytics, Dynamic Planner, CashCalc, Intelligent Office, Microsoft Office, and MiCap.
- Experience with SIPP, SSAS and Workplace Pension experience (desirable).
- Excellent personal skills – communication, empathy.
- Strong organisational skills and effective collaboration.
- Continuous practice of CII's code of conduct, demonstrating integrity and honesty in all client interactions.
- An enthusiastic approach to attaining a chartered status.

Staff benefits:

- 25 days holiday per annum + 8 statutory bank holidays.
- Financial support with professional qualifications.
- Onsite restaurant and chef, offering subsidised meals for staff.
- Pension scheme with Royal London (offering 100% employer NIC saving).
- Group Life: Death in service cover (4x salary)
- Free parking located onsite and in our overflow car park.
- On-the-job training for every aspect of the role.

Please send CV's and covering letters to recruitment@jerroms.co.uk