

Financial Planner

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Company: undisclosed

Location: London Area

Category: other-general

Financial Planner (Chartered/Certified) | Hybrid Policy | London | £ Package dependent on experience

We are working with a growing FinTech firm based in London who deliver institutional level solutions to highly sophisticated private investors. Due to significant and sustained growth in client and asset base, they are looking to add a couple of financial planners, ideally chartered or certified status with 5+ years' experience within the industry. However, they are "experience-agnostic" and would consider those a step away from chartered/certified status. Preferably, candidates would have experience providing advice to sophisticated HNW/UHNW clients and enjoy working in an entrepreneurial environment. This is one of the most exciting FinTech firms that have launched in recent years and already have significant Assets on board. Their culture is progressive, collegiate and is best described as high performance but low ego. More details on request, but it should be stressed that there are several differentiating factors this firm have compared to their competition in what is a crowded market. Perhaps best described as having the culture of a FinTech start up whilst delivering institutional level service to sophisticated investors. They are looking for well-rounded candidates who can look after a significant number of clients immediately. The right individuals would also have an interest in re-inventing the wealth management industry and the attributes to be successful in a dynamic, collegiate and ego-free culture. They are looking for those who can combine a commercial, yet consultative, approach to clients and who have a knowledge of sophisticated investment products and understanding of the sophisticated private client market. As with any role with a small, growing firm, this position will be broad in scope. Responsibilities include, but are not

limited to, the following: Be a lead adviser to a number of HNW/UHNW clients and advise on all aspects on client's financial life plans Be involved in enhancing the firm's methodology for holistic financial planning Be part of broader firm building initiatives The individual: Advanced Diploma or Chartered/Certified Financial Planner Providing financial planning advice to sophisticated HNW/UHNW clients At least 5 years of experience within the industry Detailed technical understanding of cash flow-based planning Demonstrable technical understanding of trusts, pensions, and intergenerational planning Due to demand we are advertising this role anonymously. If you would prefer to speak to someone before submitting a CV, please send a blank application to the role and someone will be in touch to discuss. We can only respond to highly qualified candidates.

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