

Junior Paraplanner

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Company: Heat Recruitment

Location: Derby

Category: business-and-financial-operations

This is your opportunity to join a dynamic financial planning firm based in Derby, dedicated to providing comprehensive financial advice and solutions to individuals and families. The team is committed to delivering exceptional service, tailored to each client's unique needs and goals. We believe in fostering a collaborative environment where professionals can grow and thrive.

Position Overview: Our client is seeking a motivated and detail-oriented Junior Paraplanner to join our team in Derby. The Junior Paraplanner will work closely with our senior paraplanners and financial advisors to support the delivery of high-quality financial plans and advice to our clients. This is an excellent opportunity for an individual looking to start their career in financial planning and gain valuable experience in a fast-paced environment.

Responsibilities: Assist senior paraplanners and financial advisors in gathering client information and conducting research to support the financial planning process. Prepare financial planning reports, including cash flow projections, investment analyses, and retirement planning scenarios. Conduct analysis of client financial data, investment portfolios, and insurance coverage to identify opportunities for optimization. Assist in the preparation of client meetings, including organizing documents and presentations. Maintain accurate client records and documentation in compliance with regulatory requirements. Stay updated on industry trends, regulations, and best practices to support continuous learning and development. Collaborate with other team members to ensure efficient workflow and excellent client service. Perform other duties and responsibilities as assigned by management.

Qualifications: Experience within financial services and working towards diploma qualification. Strong analytical skills with attention to detail and accuracy. Excellent

communication and interpersonal skills. Ability to work effectively both independently and as part of a team. Proficiency in Microsoft Office Suite, particularly Excel and Word. Benefits: Competitive salary of £28,000 to £32,000 (DOE). Opportunities for professional development and advancement within the company. Supportive and collaborative work environment. Comprehensive benefits package, including pension contributions and health insurance. What's next? Apply today to be considered for this opportunity. If suitable, one of our specialist consultants will be in contact to discuss the opportunity with you in detail prior to submitting your CV to the client. In this discussion, we will aim to identify your specific skills and motivations, and where appropriate recommend other relevant opportunities to you that match your requirements. Additionally, refer a friend or colleague to us and receive £200 if we assist them in securing a new career. Synonyms: IFA, Financial Planning, Wealth Management, Financial Adviser, Financial Advisor, Wealth Manager, Financial Consultant, CISI, CII, level 4 diploma, Independent Financial Advice, Financial Advisory, Financial Planning Analyst, Technical Support, Report Writer, Para-planner, Para planner, Adviser Support

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