

## Paraplanner - Ascot

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Company: Blakemore Recruitment

Location: Ascot

Category: business-and-financial-operations

We are currently recruiting for a highly regarded Financial Planning practice based in Ascot who are looking to recruit a Paraplanner. The firm is approx. 80 people currently, across three locations.

They offer hybrid working. 3 days in the office each week and 2 days remote working.

### **Responsibilities:**

Collating client information including soft and hard facts (fact finding)

Reviewing client information with Adviser to formulate recommendations

Make client recommendations and prepare client report for approval by Adviser

Research products, providers and funds

Responsibility for the Model Portfolio Programme

Supervise Administrators to prepare and submit application forms

Prepare Suitability Reports, Pension Analysis Reports and discussion reports to be reviewed with the Adviser

Responsibility for running the review programme to ensure all clients are offered their annual/bi-annual reviews

On-going development of procedures and report templates

Ensuring that the Advisers are always prepared for their meetings. Organising the team to

make sure forms are prepped and meeting constant deadlines for generating the reports for all meetings (including review meetings)

**Skills:**

Product knowledge - Pensions including pension transfers (analysis of Defined Benefit Schemes), Investments, ISA's, Investment Bonds, Offshore Investment Bonds, WRAPs and Platforms.

Fund research

Portfolio planning

Report writing

Strong analytical skills

**IT skills:**

Previous experience of Intelliflo/Intelligent Office, FE Analytics and Synaptic product research/fund research desirable.

MS Office and internet essential.

**Education and training:**

Fully qualified or working towards CII Diploma in Financial Planning

CII Paraplanning qualification desirable (we would encourage this exam to be sat if not already obtained)

Record of continuing development and technical learning especially in relation to pensions

**Experience:**

Experience working in a Paraplanner role within an IFA practice and ideally 3+ years' experience in a financial services support/advice role

Experience of intensive fund research and the running of model portfolios

**Personal attributes:**

Proven record of developing team and client relationships

Commercial awareness

Attention to quality and accuracy

Excellent communication skills

Able to organise workload and meet deadlines

Motivated and able to work on own initiative

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