

Paraplanner

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Company: Ferguson Dean

Location: Manchester Area

Category: business-and-financial-operations

A leading regional IFA firm, a Times Top 100 firm, are looking for a technically proficient paraplanner to join their team. They have an established team of seven paraplanners at present who work with eight advisers and have a dedicated administration team. They are keen for a paraplanner who has experience of working on more complex matters such as VCT and EIS matters as well as giving guidance and support to more junior members of the paraplanning team. They will provide full study support for Diploma and Chartered status. Package You will receive excellent salary (£40k- £50k) executive benefits and earnings. The company A leading regional IFA practice in Manchester Role Undertaking reviews for clients Preparation of reports, both from standard paragraphs and free text Undertaking whole of the market research Working on a collaborative basis with the rest of the team Keeping up to date on market positions and global situations Using cash flow modelling and lifestyle planning as required Dealing with more complex queries such as VCT and EIS, as well as providing guidance to more junior members of the team Attending client meetings as required The candidate Ideally Dip Level 4 or working towards Chartered Experience of working with HNW and UHNW clients Writing reports and undertaking research. Next steps Contact via email below for confidential discussion and review of opportunity and process

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