

# United Kingdom Jobs Expertini®

## Trainee Financial Advisor

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Company: Oakfield Group - Specialist Headhunters

Location: United Kingdom

Category: business-and-financial-operations

Job Title: Trainee Financial Adviser Location: 100% Remote within the United Kingdom Contract Type: Self-Employed We are looking to hire several Trainee Financial Advisers to join an exceptional national Wealth firm within the UK. This is an excellent opportunity for those looking to enter the world of Wealth & Financial Planning. You can either join with the following: You do not have a CII Diploma in Regulated Financial Planning You're newly qualified in CII Diploma in Regulated Financial Planning and now ready to gain experience to become an Adviser Why join: No previous financial services experience necessary Fully supported through qualifications Continue to work your current job/ attend other studies, whilst studying your CII Diploma in Regulated Financial Planning Access to Clients to help build your portfolio Ability to run your own business or join one of the firm's existing teams as a self-employed Adviser What the Academy involves: Stage 1- 0-12 months (part-time)- study and complete CII Diploma in Regulated Financial Planning Stage 2- 1 month (full-time)- Financial Adviser Foundation Programme (for those who already have their CII Diploma) Stage 3- 6+ months (full-time)- Competent Adviser Status Stage 4- 12 months (full-time) Supported journey as a new Adviser Beyond Stage 4, you'll continue to benefit from our ongoing support What does a Financial Adviser do? Understanding Client's needs whilst building a rapport, reviewing their financial circumstances and discussing future goals future goals. Analysing information, designing financial plans and preparing recommendations Recommending various financial solutions suitable to the Clients needs Responding to Clients ever change needs and circumstances Informing other professionals where necessary of the Clients'

circumstances Being up to date with taxation, legal and regulatory legislation and liaise with Clients in relation to these changes How to apply? Click apply on LinkedIn or send your CV to fayasavage@theoakfieldgroup.co.uk

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