Paraplanner

Hingham

Are you a motivated individual with paraplanning or technical support experience in financial advice or wealth management. This is a great opportunity for a qualified/part qualified paraplanner to progress your career with a well-established and fast-growing company based from our Hingham office.

Building and maintaining a solid business support team is paramount to the business success and will enable us to continue to deliver an excellent quality of service to our growing client base and support to our financial advisers.

As a reward for your efforts, we will offer a competitive salary and benefits package along with opportunities for progression, support and training.

After an initial training period, a hybrid model of working is implemented, with a mix of remote, in person and in office interactions dependent on the needs of the team, role and clients.

Role Objective

Working in collaboration with our advisers and other colleagues, you will provide a research, analysis and technical report writing service to enable good client outcomes in line with agreed service levels, company policy and values.

Company Compliance

- Ensuring all tasks are carried out within FCA regulatory requirements.
- Notifying advisers of any complaints received and following appropriate procedures within complaints handling process.
- Recording all correspondence.
- Ensuring that all dealings with clients are of an appropriate and entirely factual nature.
- Be committed to your own personal professional development, keeping knowledge up to date and attending any relevant learning sessions or other training arranged by the company.

Duties & Responsibilities

- Review the client file to ensure understanding of the client's personal and financial circumstances including their goals and investment risk profile.
- Identify gaps in the file documentation such as Know Your Client data, policy and plan information and work collaboratively with advisers and other parties to obtain this.
- Analyse client's existing arrangements to determine their ongoing financial planning to meeting clients goals and how they compare with the product panel, where relevant.
- Undertake research, producing quotes and illustrations on potential solutions to meet client goals.
- Undertake and review tax calculations.
- Be able to build, review and update cash flow models across all planning areas, and provide constructive feedback to financial planners to support their development with the tool.
- Produce clear and concise Financial Planning reports and written communications in line with company policy to enable the client to make an informed decision.
- Ensure that all relevant systems are updated and that the file provides a full audit trail of the advice process.
- To manage own workload effectively and meet productivity KPIs whilst maintaining high quality.
- To continually develop product and technical knowledge across all areas; keeping up to date with any changes which may affect the advisory market.
- Covering for colleagues where required such as reception and coaching colleagues.

Other

Undertake all other duties as reasonably required and directed.

If you are interested in learning more about this role or want to apply, please send your CV/Application to Robyn Lovatt, robyn@hfp.co.uk.

This Job Description may be reviewed and subsequently amended to better reflect any changes required in the role.