

JOB DESCRIPTION

Job Title:	Financial Planner
Reporting to:	Managing Director
<p>Brief description of role and responsibilities:</p> <p>Financial Planners provide clients with advice and make recommendations on ways to best utilise their assets to achieve their objectives. As a professional, a Financial Planner offers expert advice on suitable mortgages, investments, insurance, tax and private pensions and creates a valuable financial plan for a client</p>	
<p>Specific duties and responsibilities:</p> <ul style="list-style-type: none"> • To adopt UNIQ Family Wealth’s 6 step process of Financial Planning process as laid down by the Financial Planning Standards Board (FPSB) and provide advice to individuals, families and family businesses. • To conduct in-depth reviews of clients' financial circumstances, current provision and future aims based on their changing needs and circumstances • Analyse information and present Financial Plans best suited to individual clients' requirements • Assess client’s attitude to risk and capacity for loss using UNIQ Family Wealth’s risk assessment tool of choice • Design financial strategies • Assisting clients to make informed decisions and educate them on UNIQ’s Financial Planning and Investment Philosophy • Liaise with financial services providers to keep up to date on solutions in the market place • Review Cashflow Forecasts and recommendation reports prepared by the Professional Support team • Develop new client opportunities via referrals, professional connections and networking in line with the growth strategy adopted by the business. • Meeting the regulatory aspects of the role, e.g. requirements for disclosure, costs of the services provided and costs the advised products; • Maintaining professional qualifications, e.g. ongoing assessments and structured Continuous Professional Development; • Deliver all of the above with integrity, honesty and professionalism. 	
<p>Qualifications and experience required</p> <p>Level 4 Diploma 5 years’ experience within a client service environment 5 years’ experience in delivering client advice Good communication and computer literacy skills required Good presentation skills</p>	