

## JOB DESCRIPTION

<b>Job Title:</b>	Paraplanner
<b>Reporting to:</b>	Marlene Outrim
<b>Brief description of role and responsibilities:</b>	
<p>To provide technical and research support to Financial Planners in the delivery of their advice to clients. This support includes completing research and analysis, preparing suitability letters and writing client reports.</p>	
<b>Specific duties and responsibilities:</b>	
<ul style="list-style-type: none"> <li>• Preparation of new and existing client Cashflows ready for Cashflow meetings and Annual Strategy meetings</li> <li>• Receiving instructions from meeting notes/tasks from Financial Planners following client meetings.</li> <li>• Interpreting data obtained by Planners during client meetings and establishing with the planner via de briefings the correct recommendations to be taken.</li> <li>• Analysing data received by clients and providers then use research tools to provide solutions to meet client needs and objectives.</li> <li>• Contacting third parties and providers to gather detailed information.</li> <li>• Generating and accurately saving research undertaken in a structured and consistent format.</li> <li>• Writing Suitability Letters and Financial Planning reports that are accurate, personalised and match the client's objectives.</li> <li>• Provide all appropriate appendices, illustrations, applications and Key features documentation for Suitability Letters and Reports</li> <li>• Implementing agreed actions from Authority to Proceed notifications including taking fees from providers, allocating investments to wrappers, linking investment models, placing buy/sell trades</li> <li>• Monitor Negative Cash positions for clients on a monthly basis and recommend appropriate solutions.</li> <li>• Complete annual ISA reporting to ensure all clients (where applicable) has utilised the annual ISA allowances.</li> <li>• Participate and contribute to the investment committee meetings.</li> <li>• Analyse and provide specific client portfolio reporting.</li> <li>• Carrying out all tasks in a manner consistent with compliance procedures.</li> <li>• Keep up to date with legislation and product changes by attending and maintaining continuous professional development.</li> <li>• ability to work efficiently under own initiative with impeccable attention to detail;</li> </ul>	
<b>Qualifications</b>	
<p>Ideally you would have GCSEs Grades (A-C/1-3) in Mathematics and English and hold the Certificate in Financial Planning or equivalent. The candidate must be prepared to study up to level 6 qualification with a Recognised Professional Body.</p> <p>The candidate must also have good IT skills and excellent telephone manner.</p> <p>Continuing Professional Development (CPD) should be undertaken to develop skills and knowledge.</p>	