

We have a fantastic opportunity to join our collaborative and social team.

Trainee Paraplanner

The role:

Joining our busy Paraplanning Team you will provide support to our Financial Advisers and to the rest of the Paraplanning Team. The scope and duties of the role will be dependent on your experience but as a minimum you will be:

- Preparing post annual review follow up letters to clients
- Working on Bed & ISA research and suitability reports
- Working on Bed & Pension research and suitability reports
- Producing research and preparing suitability reports for top ups to existing business

About you:

To be successful it's vital that you have:

- The willingness and aptitude to progress through CII qualifications to Diploma level (existing CII qualifications are desired but not essential)
- Minimum 2 years' experience within Financial Services
- Knowledge and experience of investments and pensions (protection and mortgage knowledge is desired but not essential)
- Strong communication skills

Benefits:

- CII exam support and pay increases for CII exam passes
- Hybrid working – up to 3 days per week working from home and a minimum of 2 days per week at our Derby office
- Salary £22,000 to £28,000 dependent on experience and qualifications
- Generous pension contributions and Group Life Assurance cover
- Opportunity to progress your career into Paraplanning and beyond

Want to apply?

If you'd like to find out more about this exciting opportunity please email a copy of your CV to careers@createfm.co.uk and we will be in touch.