

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

Paraplanner

The role:

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

- Information analysis and undertaking product and fund research
- Preparation of draft recommendations
- Preparation of comprehensive financial plan / cash flow forecasts
- Keeping up to date with product and legislative changes
- Ensuring compliance with FCA regulation
- Maintaining client records via Intelliflo Office
- Dealing with ad hoc requests from Advisers and Clients
- Working on Bed & ISA and Bed & Pension research and suitability reports
- Producing research and preparing suitability reports for top ups to existing business
- Triaging Letter of Authority responses to ensure all the required information has been obtained and researching alternative solutions
- Training of basic Paraplanning cases to new entrants and existing colleagues
- Completion of Annual Review Suitability Reports
- Management/allocation of Paraplanning diary when the Senior Paraplanner is unavailable
- To provide occasional support to our Administration Team with general office duties to include welcoming visitors, booking meeting rooms, dealing with post, scanning and answering the telephone

About you:

To be successful it's preferable that you have:

- CII qualifications – progress towards CII Level 4 Diploma is expected
- Minimum 2 years' experience within Financial Services
- Experience of Paraplanning for investments and pensions with technical knowledge (protection and mortgage knowledge is desired but not essential)
- Knowledge of SIPP/ Drawdown Pension arrangements (knowledge of WRAP platforms is desired but not essential)
- Strong analytical skills
- Excellent communication skills
- High level of competency with Microsoft and experience with Intelliflo Office is highly desirable

- Good attention to detail with ability and desire to work to a high standard
- An ability to deliver excellent customer service

Benefits:

- CII exam support
- Hybrid working – up to 3 days per week working from home and a minimum of 2 days per week at our Derby office
- Salary up to £38,000 dependent on experience & qualifications
- Opportunity to progress your career

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.