We Are Hiring!

Paraplanner
Full Time Vacancy

An opportunity has arisen for a Paraplanner to join a successful and growing company.

Wise Investment is an independent, employee-owned wealth management and financial planning business. Since the company was founded in 1992, we have provided financial advice and investment management solutions to private clients. Quality and excellence sit at the core of our values and our team of experienced, qualified investment and financial planning professionals are committed to providing the best service with attractive returns, through the development of long-term relationships with our clients.

The main areas in which we specialise are long term investment management, planning for retirement, generating income from assets, and financial protection. We also advice our clients on how to pass money through the generations in an appropriate and tax-efficient way.

We aim to give the type of advice that we would want to receive ourselves. Ultimately, our aim is to take the financial complexities and worries away from our clients allowing them to spend time focusing on the things in their lives that matter most to them, whether it is work, business, family or simply enjoying a well-earned retirement.

Please continue...

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Main Responsibilities

The successful candidate will be working as part of a small, established team of paraplanners based in Chipping Norton.

The office hours are Monday- Friday 9am to 5pm.

The responsibilities will include working with the financial planners, administrators and with other members of the team, to deliver a high quality, efficient service to both customers and staff. This is a technical position, dealing at times with complex figures and rules, as well as routine tasks, which will not be limited to those listed below.

The following is a selection of the duties to be carried out:

- Analysis of client circumstances, objectives, requirements, and risk profile
- Research into, and analysis of, client current financial arrangements
- Analysis of client CGT position, and other tax considerations
- Researching products, and solutions
- Preparation and writing of recommendation letters and reports
- Assist with client reviews, including attending some client meetings
- Dealing with queries from clients and other staff
- Work with other team members to keep client records up to date.
- Keep up to date with changes in all necessary financial planning areas

Key Requirements

- 1-3 years plus paraplanning experience
- Minimum level 4 Diploma qualified or equivalent within the finance industry
- Strong inter-personal skills
- Thorough knowledge of investments, pensions, and financial services regulation
- Commitment to excellent customer service
- Report writing skills
- Excellent written and verbal communication
- Solid numeracy skills & statistical analysis

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Key Requirements Continued

- Ability to conduct research
- Good computer skills,
- Self-motivated and team oriented
- Ability to prioritise multiple tasks and deadlines
- Highly organised and adaptable
- Accuracy and attention to detail

Salary and Benefits

Basic salary	dependent on experience
Pension contribution	Pension contribution 5% of basic salary. Salary sacrifice available
Holiday allowance	29 days, plus Bank Holiday & Christmas week One volunteer day per year
Individual training budget	£1,500 per year (10% can be used for personal training)
Death in service	4x basic salary (salary cap £245,000)
Income protection	Maximum 75% of basic salary (salary cap £145,000)
Working hours	Working hours 35 hours per week
Probation period	Probation period 6 months

Salary and benefits work on a pro-rata basis for part-time Partners. Offers of employment are reliant on the receipt of satisfactory references and background checks such as adverse credit and DBS (basic).

Please apply by sending your CV and cover letter to:
leeann.taylor@wiseinvestment.co.uk