

Job Role: Paraplanner

Salary: £27,500 to £37,500 per annum (negotiable) plus benefits

Job type: Full Time, Permanent (part time considered)

Location: Boston Spa, West Yorkshire

This is an excellent opportunity to join an ambitious, forward thinking and friendly office, on a competitive salary, where you can influence the development of the business and can be an integral part of providing advice to our clients.

To support the growth and development of our firm we are seeking a technically astute paraplanner to provide a proactive and comprehensive service to the Financial Planner (Managing Director) to assist in client meetings.

Company Profile

We believe that life is for living, which is why we provide holistic financial planning advice to our clients, who want to ensure they can continue to live life to the full.

This thriving and family run company is based in the heart of Boston Spa near Leeds. We have established ourselves over a number of years, as the trusted adviser for private clients seeking expertise on managing their finances. Our business is proud to hold the "Chartered Financial Planners" Firm status and Accredited Financial Planning Firm™ status.

We aim to give our clients the very best service and our employees the very best support in their work.

Our business is built on a firm commitment to customer care and the culture of our business reflects this.

Key Purpose of the Role

The Paraplanner will provide in-depth, hands on technical support to the Managing Director of the Firm throughout the advice cycle.

Tasks will include analysis of existing financial products, researching suitable solutions, preparing recommendations and complex report writing.

The Paraplanner will manage the entire process from the first meeting with a new client to undertaking the business, producing relevant and accurate documentation at each stage of the process.

Beaufort Financial Planning (Yorkshire) Limited is a rapidly growing firm. The Paraplanner will be a self starter, expected to have a high level of independent responsibility, whilst being involved in a range of activities. You will be required to utilise and strengthen your industry knowledge and undertake further professional training as required to stay up to date.

The role is expected to evolve and grow in line with the company expansion.

Essential Skills

- High attention to detail and accuracy.
- Ability to analyse numbers and statistics.
- Ability to conduct research for appropriate providers and investments.
- Good understanding of compliance issues.
- Knowledge of VCT's EIS, IHT planning and Pension Crystallisation options.
- Ability to use technical financial planning tools, financial modelling and back office software.

Job Standards for the Role

- Ideally you will hold or be working towards completion of your Diploma Level 4 with a desire to achieve Chartered and or Certified status .
- It is essential that you have a minimum 2 years previous experience in a similar position.
- You will have good technical financial knowledge and an understanding of personal taxation.
- Experience of complex report writing and conducting whole of the market product research .
- A high level of analytical capability.
- The ability to develop and maintain systems and procedures which improve the efficiency of client case preparation and submission.
- Be able to work on own initiative & achieve agreed outcomes without supervision.
- The ability to work as part of a team and manage colleagues, interact with clients and providers at all levels outside of the business.
- Assist in the development of less experienced members of staff.
- Act as main point of contact and deal effectively with technical queries from clients and other parties through effective communication.

How to Apply

If you have the experience and the desire to make a difference in this expanding company, please register your interest in confidence.

The successful applicant will receive a competitive basic salary, as well as a range of benefits. You will also enjoy being part of a small friendly team, where there is the opportunity to be an integral part in the growth of the business.

Please send your CV and a short covering letter to selson@beaufortplanning.co.uk explaining why the opportunity interests you and why you would be a valuable addition to our team.

We look forward to hearing from you.