

# Private Client Investment Management Company

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## Paraplanner

May 2021

### Introduction

We are a discretionary investment management company, providing investment management services and financial planning solutions to private clients.

We are a successful, privately owned, LLP, with offices on the south coast and in London.

We have a strong, dynamic culture where everyone feels part of a team and where they can have fun and grow in their career.

### The Role

We are recruiting an experienced, high calibre, **Paraplanner** to be based in our Solent office, Whiteley. You will be able to demonstrate a background of providing high level technical paraplanning including the production of cash flow models and high-quality suitability reports.

The role will report to the Head of Paraplanning and the key areas of responsibility are as follows:

- Analyse client information and existing investments/policies
- Tax calculations
- Construct appropriate solutions for clients and make recommendations in conjunction with the advisers
- Write complex suitability reports
- Cash flow modelling
- Review and document procedures and workflows
- Liaise with clients, and attend client meetings where required
- Point of contact for technical queries
- Assisting with training colleagues

### The Person

The successful candidate will be confident dealing with HNW clients and professional connections and a natural problem solver. The role may suit an able career paraplanner who does not wish to be client facing but does want to be a key individual within a thriving business.

They will:

- Demonstrate a strong technical knowledge and understanding of all financial products
- Be level 4 diploma qualified as a minimum and ideally working towards Charter status
- Have a minimum of 3 years' experience within a paraplanning role
- Have strong IT skills; experience of Curo, FE Analytics and Voyant advantageous
- Have a good attention to detail
- Be an effective communicator, both verbally and in writing
- Be able to deal with a fast pace and high-pressure workload and need to not be afraid to challenge

### Remuneration

£30,000-£45,000 depending upon experience and knowledge, generous holiday allowance and benefits (pension, Income protection and death in service). Relevant exam support after the successful completion of a probationary period.