

## HOYL INDEPENDENT ADVISERS

[www.hoyl.co.uk](http://www.hoyl.co.uk)

Hoyl Independent Advisers are proud to provide only bespoke, high quality independent financial advice to personal and corporate clients. We offer a full range of financial services covering all retirement planning, investment, mortgage and insurance needs.

We're proud to have been recognised as one of the top financial advisers in the UK by FTAdviser, an achievement which clearly reflects our reputation as a firm providing only high quality financial advice and also our strong belief in ethical conduct.

We seek to employ a Senior Paraplanner who will be based at Upton House in Cromer (with some remote working). The successful applicant will be working alongside an established team.

Remuneration and other benefits are competitive.

### Job Description

Job title	Senior Paraplanner
Reports to	Adviser Support Operations Manager
Location	Cromer/remote
Salary	Starting salary £30,000 to £38,000 (dependent on experience)
Contract	Permanent
Hours	37.5 hours per week (Monday to Friday)

### Role Summary

Purpose: To work with Financial Advisers/Planners to deliver suitable advice and good outcomes for our clients. The role includes assisting with review of existing plans to confirm suitability, researching current and potential new recommendations using a variety of methods and bringing this together to a single and comprehensive client facing report. The role involves working the Adviser and Adviser Support Teams as well as Operations Management and Compliance, liaising with the board of Directors as required. The role also provides the ability for the successful candidate to shape the work of Paraplanning within the business and act as a role model to other members of the team.

### Main duties

#### Duties:

- Review of fact find documentation to ensure sufficient information is obtained to 'know the client'
- Analysis of product and investment information to fully understand the various product and portfolio/funds used
- Preparation of comprehensive recommendation reports
- Preparation of comprehensive financial plans / cash flow forecasts / discussion documents for holistic planning activities
- Adherence to the Hoyl Advice Standards for delivery of suitable advice and acting as a first line of defence for unsuitable outcomes
- Having active discussions with firm advisers to maintain the standards of advice and help set client expectations

- Ensure new business is seen through to completion and are in line with standardised administrative and compliance procedures.
- Providing client contact and updating clients on progress as required
- Maintaining accurate CPD. Keeping up to date with product and legislative changes
- Adhering to internal policies and processes to ensure compliance with regulation
- Working to defined service level agreements for the completion of work to ensure advice is provided to clients in a timely manner.
- To ensure client records are kept updated and advice files support the provision of suitable advice using electronic systems.
- Keying/training/shadowing of new business/review applications
- Training of basic Paraplanning cases to new entrants and existing colleagues
- Providing support to the wider as required due to workload and ensuring work progresses in an efficient and timely manner
- Management/allocation of diary when Paraplanning Co-ordinator on annual leave
- Supporting the Paraplanning Co-ordinator with provider/platform projects/campaigns (for example: migration, log-ins, ISA allowance campaign etc.)
- Attendance at team meetings and delivery of technical presentations and updates
- To assist with other office duties when required.

**General:**

- To attend internal or external training sessions as and when instructed
- To observe and comply with Health & Safety and company policies.

*This list is not exhaustive. There may be, from time to time, additional duties at the request of your Line Manager or other Senior Manager.*

## Person Specification

Attributes	Essential	Desirable	Assessment method
Education / Qualifications	<ul style="list-style-type: none"> <li>• Good standard of education including English and Maths, grade C or above at GCSE.</li> <li>• Level 4 Diploma for Financial Planning (or equivalent)</li> </ul>	<ul style="list-style-type: none"> <li>• Additional qualifications for Long Term Care and Pension Transfers</li> <li>• Chartered Level Qualification</li> </ul>	Application
Experience / Knowledge	<ul style="list-style-type: none"> <li>• Microsoft Word, Excel, Outlook.</li> <li>• Practical and technical knowledge of pensions and investments</li> <li>• Experience of working in a financial planning environment and producing reports for accumulation and decumulation advice</li> </ul>	<ul style="list-style-type: none"> <li>• Awareness of equality and diversity.</li> <li>• Microsoft Teams communication, file storage and tasks.</li> <li>• Experience and exposure to different provider solutions, for instance platforms</li> <li>• Experience of using back office administration systems, specifically Intelliflo</li> </ul>	Interview / task
Skills	<ul style="list-style-type: none"> <li>• Ability to work on own initiative</li> <li>• Team Player</li> <li>• High attention to detail.</li> <li>• Excellent communication skills, both written and verbal</li> <li>• Strong Word / Excel Skills</li> <li>• Strong analytical skills</li> <li>• Excellent interpersonal skills</li> </ul>	<ul style="list-style-type: none"> <li>• Group presentation skills</li> <li>• Training and development of team members</li> <li>• People Management</li> </ul>	Interview / task
Personal qualities	<ul style="list-style-type: none"> <li>• Calm under pressure.</li> <li>• Pleasant manner.</li> </ul>	<ul style="list-style-type: none"> <li>• Committed to professional development</li> <li>• Commercial acumen</li> </ul>	Interview

	<ul style="list-style-type: none"> <li>• Best customer outcomes mind set.</li> <li>• Professional attitude.</li> <li>• Punctual.</li> <li>• Enthusiastic.</li> <li>• Flexible approach to duties.</li> <li>• Self motivated and proactive.</li> </ul>		
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Employment checks Evidence of eligibility to work in the UK will be required

More information If you would like to contact us for an informal chat, or for further information, please email [hr@hoyl.co.uk](mailto:hr@hoyl.co.uk)

How to apply Please download an application form from our website at <https://www.hoyl.co.uk/> and email it to [HR@hoyl.co.uk](mailto:HR@hoyl.co.uk) (application forms are available in large print)

Closing date 9.00am Monday 28<sup>th</sup> June. We reserve the right to appoint early, before the closing date, so please do not delay in applying.