

Hoyl Independent Advisers Ltd - Paraplanner

We seek to employ a Level 4 Qualified Paraplanner The successful applicant will be working alongside an established team.

Job Description

Job title - Level 4 Qualified Paraplanner

Reports to - Paraplanning Proposition Manager

Location - Office based Cromer, Norfolk .

Salary - From £30,000 (dependent on experience)

Contract - Permanent Hours 37.5 hours per week (Monday to Friday)

Benefits - Income Protection Benefit, Death in Service Benefit, and access to team building events and activities.

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

- 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
- Attendance at team meetings and delivery of technical presentations and updates
- To assist with

other office duties when required. General: • To always present a professional and positive image on behalf of the company • To attend training sessions as and when instructed • To observe and comply with Health & Safety and company

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

Please forward your CV for consideration to hr@hoyl.co.uk