

Beckford · James

chartered financial planners

Beckford James Role Description & Profile

Job Title	Trainee Paraplanner
Reports to	Compliance Manager – Claire Sweetman
Job Package	<ul style="list-style-type: none">• £24,000 - £30,000 dependant on experience and progress towards CII diploma• 25 days FTE annual leave and 8 bank holidays.• Eligible for Pension, death in Service and Private Medical Insurance after successfully completing probation.

About Beckford James

Beckford James is a Chartered firm of Independent Financial planners.

Financial Planning begins by working out what's important to a client in life and how to plan their finances accordingly.

Independent means that we work unrestrictedly across the whole market to find the most appropriate solutions for their needs.

Our chartered status is a reflection of our commitment to professionalism, ethics and learning, all of which translate into high quality financial planning for our clients. The majority of our planners are chartered with newer members on the journey to attain the higher-level qualification. We are proud to have been awarded the prestigious title "Chartered Financial Planners" by the Chartered Insurance Institute (CII).

Genuine professionalism has never been so valued or so necessary. When a client uses a Chartered Firm they know that they are dealing with proven professionals, committed to developing and maintaining knowledge and capability to deliver the highest quality advice.

Chartered firms must also follow a demanding ethical code of practice, placing the clients' interests at the heart of the advice they give.

A Chartered title is a commitment to an overall standard of customer excellence and professionalism

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About the Role

As a Trainee Paraplanner you will:

- Learn to provide bespoke technical suitability reports concerning both investment, protection, and retirement related matters
- Evaluate client's circumstances, portfolios, risk levels and objectives to provide appropriate and client friendly suitability reports
- Undertake technical research by using specialist programs and cost comparison tools to help find fund and product recommendations
- Prepare new business cases including illustrations and detailing all provider forms
- Ensure that the preparation of advice for clients (both internal and external) is of the highest quality and delivered in an efficient manner whilst mitigating any risks to the business and assisting with the achievement of business targets.
- Develop and maintain effective relationships with clients and colleagues.
- Ensure all relevant compliance paperwork has been carried out.
- Carry out technical research as part of the existing arrangement review process.
- Maintain core systems ensuring that all tasks are carried out and completed in line with the company policy and procedures.
- Maintain awareness of, and act in accordance with, all Compliance and legislative obligations.
- Proactively enhance industry and Company knowledge, through external and internal sources and maintaining an accurate CPD log

As a trainee role and depending on experience, the early months will be spent working with both the Compliance and Administration departments learning the advice process and the standards required to create a compliant advice file and process an application. This will involve completing file reviews on recent advice, submitting application paperwork and using the various provider/platform website.

Technical Knowledge, Experience & Qualifications

- Proven experience in a Financial Services environment.
- Excellent standard of education with a desire to further development and to undertake relevant examinations. Ideally already started the CII diploma.
- Proficient IT skills in core Microsoft Office systems.
- Organisation and prioritisation skills.
- A high level of written and verbal communication skills and the ability to communicate well at all levels in a clear, appropriate and timely fashion.
- Has the ability to evaluate information, review options, make appropriate decisions and understand consequences.
- Very strong attention to detail and accuracy.