



ASTON CHARLES

Specialist Financial Services Recruitment



Paraplanner

Leeds

to £35K plus benefits

An exciting opportunity has arisen with a leading provincial wealth management practice for an experienced Paraplanner to join its existing team. You will support various highly successful IFA's in areas of pension and investment advice. You will be expected to research and analyse products that are appropriate to the clients' circumstances, as well as preparing detailed reports. Whilst not essential, ideally you will already be Diploma Level 4 qualified, or working towards this. More important, however, is your existing knowledge of pensions and investments, as you will be an integral part of the financial planning process. In return, you will receive a fantastic package comprising competitive basic salary and a range of company benefits. If you are considering progressing to an Advisor role, this can also be accommodated.

Financial Planner x2

North West/ Midlands

£45K – £85K (OTE to £100K+)

A long-established and reputable wealth manager now requires a Financial Planner who has a proven track record of giving outstanding pension and investment advice. This award-winning organisation provides holistic financial advice across the whole country on all matters relating to private client financial advice, with a particular bias towards pensions. You will benefit from existing clients to advise from day one, as well as the support of large paraplanning and administration teams, which will allow you to focus purely on clients. An employed role with a highly attractive salary, there is no threshold to achieve before earning bonus with this role, resulting in substantial, unrivalled earnings potential. You will also enjoy an additional benefits package.

CF30 Paraplanner

Bletchingley

£35K – £45K plus benefits

An exciting opportunity has arisen with a leading local financial planning practice for an experienced Paraplanner to carry out a hybrid paraplanning/ advisory role, due to continued growth. You will provide technical support to the Managing Director in areas of pension and investment advice, researching and analysing products that are appropriate to the clients' circumstances, as well as preparing detailed reports. It is essential that you are Diploma Level 4 qualified, as you will look after your own portfolio of clients, conducting regular reviews. In return, you will receive a fantastic package comprising competitive basic salary and a range of company benefits, as well as potential for earning additional bonus. This represents a fantastic opportunity for a proven Paraplanner to progress into an advisory role.

IFA

Leeds

to £50K plus car allowance, bonus & benefits

A highly respected and leading independent Insurance Broker, with a long-established and successful Financial Services Division, requires an additional IFA due to organic growth. Benefiting from the established corporate relationships on the insurance side of the business, you will work closely with the Broking Team in order to generate new business opportunities with their clients, as well as working together to source new business. With various auto enrolment staging dates on the horizon, combined with the makeup of the existing client bank, there is huge potential to generate substantial levels of business. As well as an attractive salary and competitive bonus structure, you will receive a comprehensive range of additional benefits including car allowance, health cash plan, group life cover and pension.

Independent Financial Advisor

Yorkshire

to £50K, plus bonus and benefits

This national advisory practice is seeking further growth within its northern satellite office, through the appointment of an experienced IFA. Its northern hub is the largest and most successful office outside London, and is currently enjoying a sustained period of growth. Providing holistic financial planning solutions to a range of private clients, you will work closely with Investment Managers and other colleagues to deliver a first class and wide-ranging advisory service. You will be given an allocated client bank to service, being supported in developing new business and further client prospects, as well as benefitting from technical back-office assistance. Excellent earnings potential is on offer, as well as genuine career prospects within a growing practice.

IFA Administrator X2

Wirral

to £26K plus benefits

This business, established in the local area for a number of years, provides first-class financial planning solutions for a broad client base of high net worth individuals. Working as part of a small but busy Team, you will provide administrative support to the Directors. The role will include the processing and submission of new business and policy tracking, as well as the preparation of annual reviews for Advisers' client meetings. Other duties will include obtaining quotes, assisting with product research and financial reports. My client is offering a competitive basic salary, as well as a benefits. You will also enjoy genuine long-term career prospects with the opportunity to move into paraplanning, and potentially advice, should you wish to do so.