

Senior Technical Paraplanner

Key details

Location Trowbridge, Wiltshire

Salary £40,000 - £50,000 (depending on experience) plus discretionary quarterly bonuses

Sector Wealth Management, Financial Services

Job Type Permanent, Full-time, 37.5 hours per week or Part-time. Part office based part home working

Qualifications Chartered Status, or working towards

Experience 5 years plus working as a Paraplanner

To Start Immediately

Company benefits:

- **Discretionary Quarterly Bonuses**
- **Company Pension** 5% employer 5% employee. Salary sacrifice offered.
- **Holiday Entitlement** 23 days basic plus 8 bank holidays. 1 extra day after 2 years service, a further 1 for 5 years service. Ability to buy or sell up to 3 days holiday on top of this.
- **Group income protection**
- **Group life cover** 4 x death in service
- **2 Paid Sick Days** per annum
- **Flexible Fridays** - option to work 8am-4pm
- **Wellness Programme**
 - Unlimited access to a 24/7 online GP available to insured employees, their partners and children up to age 21
 - Mental health support & consultations
 - Second medical opinion
 - Physiotherapy sessions
 - Access to fitness plans and nutrition consultations
 - Bereavement support & probate help

Montgomery Charles is a forward-thinking Wealth Management firm who encourages and supports its staff to maximise their potential both academically, through exams, and through a variety of project work. Putting the client first has been in our DNA for over 25 years. Our tagline 'Helping you get more *life* out of life', came from our existing clients' description of what we do. This sentiment is embedded into our office culture.

A new joiner to our team can expect to work amongst highly qualified, smart and nice-natured peers. We pride ourselves on delivering a highly personalised service to Business Owners, Principal Dentists and Private Clients. The new Paraplanner can expect to benefit from the thorough and structured training programme that each new joiner passes through when they arrive at Montgomery Charles. The successful candidate will be encouraged to bring their own flare and enthusiasm to the Paraplanning team, whilst embodying the client centric values of the company. We are looking for someone who is energetic, empathetic, motivating and a natural team player to join our well-oiled machine.

Day-to-day Paraplanning Duties

- Supporting the consultants ahead of their client meetings
- Preparing compliant, technical suitability reports and 'Financial Life Plan' reports detailing the consultant's recommendations for the client
- Client annual reviews
- Carry out technical research and analyse data collected on behalf of clients
- Accurately invest client money as per Consultants' recommendations post client meetings
- Liaise with clients post meetings answering technical queries
- Proactive in identifying investments/tax saving opportunities for clients
- Manage and prioritise your work
- Evaluate investment portfolios with consultants
- Liaising and working closely with the Service Team

Skills, Experience & Qualifications Required

- Chartered Status, or working towards
- Worked in a Technical Paraplanner role for at least 5 years
- Strong knowledge of IT and with Back office system experience (We use Prestwood Truth)

Candidates must have excellent IT skills in MS Word & Excel and the ability to work under pressure to deadlines. We pride ourselves on our processes and continue to evolve and improve our clients' experience.

It is imperative that the candidate has an excellent telephone manner and superb customer service skills. The successful candidate will demonstrate high inter-personnel and organisational attributes and be ready to support the rapid growth of this dynamic financial planning practice.

Apply now

An exceptional opportunity for the right personality, this position is an excellent choice for a candidate looking to get stuck into a varied and demanding but hugely rewarding position.

To apply, send your CV to Kathryn: kathryn@montgomerycharles.co.uk

We look forward to hearing from you.