

Job Specification: Technical Paraplanner

- **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 p/w) or part-time. Part office-based, part home working
- **Qualifications** Diploma qualified
- **Experience** 3 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, multiple award-winning wealth management firm who have been putting our clients first for almost thirty years. Our motto, “helping you get more *life* out of life”, came from our existing clients’ descriptions of what we do. We are exceptional at managing people’s finances and have a superb technical team, but it’s all done with the aim of making money do good things and ensuring our clients live rich and meaningful lives.

While our clients are important to us, nothing we do is possible without happy and productive staff. We are proud to have an outstanding track record in helping our staff maximise their potential, both academically through exams and through a variety of project work.

A new joiner to our team can expect to work amongst highly qualified, smart and nice-natured peers, and can expect to benefit from a 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, a natural team player, and keen to join a 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

- Level 4 Diploma qualified
- Worked in a Technical Paraplanner role for at least 3 years
- Strong knowledge of IT, MS Word & Excel, and with back-office system experience

Candidates must have a flexible approach and be able 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

If you'd like to speak to us informally about this role, we are always happy to chat. Contact Kathryn at the above address if you'd like to do this.