

Job Description: IFA

Location: Manchester

Job Description

- Employed position working within an established IFA practice
- Working with professional introducers
- Working within a team – paraplanners/admin
- Private client (HNW) and Corporate advice
- Private client - Protection; Investments including Direct/ISA/Onshore Bond/Offshore Bond/Structured Product/VCTs/EIS; Pensions including PPs/Drawdown/Annuity/ SIPP/SSAS; IHT and Trust Planning
- Corporate advice – Group Risk; Group Pension; Auto Enrolment; Protection
- Business Development

Qualifications

- CAS
- Minimum Level 4 Diploma QCA
- Preferably working towards Chartered
- Driving Licence
- Clean CRB

Skills

- Excellent communication, interpersonal and listening skills;
- The capability to explain complex information simply and clearly;
- The ability to network and establish relationships with clients;
- Research and analytical skills;
- Negotiation and influencing skills as well as determination and tenacity;
- The ability to work in a team;
- Time management skills;
- Customer service skills;
- Self-motivation and organisation;
- A good level of numeracy and IT skills;
- A target-driven mindset;
- A flexible approach to work;
- Decision-making skills;
- Discretion and an understanding of the need for client confidentiality;

- An ethical and professional approach to work.

Contact:

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