

JOB DESCRIPTION

| | |
|----------------------|--------------------------------------|
| Job Title | Paraplanner |
| Reporting to | Paraplanning Manager |
| Place of Work | 8 St John Street |
| Hours of Work | Full Time – 9 - 5pm Monday to Friday |

Purpose of Role

It is your duty to write reports using word, excel and various other websites for Financial Advisers. You will complete any non-client facing tasks involved in the preparation of reports for Pareto clients as requested.

Key Tasks

- Construct “Pre Sales” Reports for Adviser/Compliance sign off
- Construct “Suitability Reports” for Adviser/Compliance sign off
- Construct “Drawdown” and “Annual Review” letters for Adviser/Compliance sign off
- To provide all support material for the client recommendation, including illustrations and application forms
- To carry out specialised technical administration duties for the Advisers
- To work with statistics and analyse submitted report requests for clients from the Advisers
- To compile reports as requested in a timely fashion
- To assess client contracts and write technical reports to assist the Advisers in future planning
- To research various websites using web based tools and make recommendations of appropriate financial providers and investments
- To provide quotes as necessary
- To manage own workload and assist Advisers in their workload
- To keep up to date with finance industry knowledge, products and legislation through research and discussions with colleagues
- To manage own learning and understanding of compliance issues
- All of the above in a compliant manner as set by Pareto and the Regulator’s procedures

General for all staff

- The principle roles and responsibilities will change from time to time and the post holder is required to undertake any additional duties as deemed appropriate.
- Staff are required to have a Personal Development plan and to participate in training, meetings or conference considered relevant to their job.
- Staff must carry out their duties with full regard to the rules policies and procedures and conditions of service contained in the staff handbook
- To abide by the company’s policies and procedure
- To adhere to all health and safety legislation
- **To undertake any other task that is deemed reasonable within your skill set**