

JOB DESCRIPTION – INDEPENDENT FINANCIAL ADVISER			
Job Title:	IFA		
Reports to:	Sales Directors		
Department:	Financial Advisors		
Location:	Various North West Locations (Head Office Manchester City Centre)	Date of Job Description	1 st May 2017
Purpose of the role:	Experienced financial planner to join our expanding team and offer quality service to our clients.		
Key Duties	<ul style="list-style-type: none"> • Working with professional Introducers – Accountancy Practices • Working within your support team of Paraplanners and Administrators • 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 		
Skills & Experience	<ul style="list-style-type: none"> • Currently or previously worked within an IFA environment dealing with High-net worth clients. • 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 mind-set; • 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. 		
Education / Qualifications:	<ul style="list-style-type: none"> • CAS • Minimum Level 4 Diploma QCA • Preferably working towards Chartered • Driving Licence • Clean CRB 		

Reward Package	<ul style="list-style-type: none"> • Competitive Salary • 35 hours per week • 23 days holiday plus Bank Holidays. Loyalty days with continued service. • Christmas Closure • Quarterly Bonus Scheme • Pension • Private Medical Insurance • Life Assurance • Fully funded company social events – summer and winter • Generous Study/Training Program • Personal Development Plan; Quarterly 1:1 meetings and Annual Appraisal System
The Company	<ul style="list-style-type: none"> • Pareto Financial Planning Limited was founded in 2008 and are an award-winning firm of independent financial advisers (IFAS), with an established reputation for dealing in all areas of financial planning. • Winner of The Talk of Manchester Business Awards – Best IFA • We value our people; now employing 33 people – recently boosted its turnover to over £4 million. This has led to new clients and total funds under influence being more than £500 million. • Company growth is 20% year on year. • Training Academy ethos for those that want to develop their career. Company provides an excellent In-House training program for you to progress your career including a generous study scheme and Personal Development Plan. • Great atmosphere, team spirit and thoroughly enjoyable working environment. • Organised social events calendar for all who want to participate. • Good work/life balance structure in place. • Dedicated to various charities throughout North West.
To Apply	<p>Stuart Carswell or Paul Stones careers@paretofp.com</p>