

## JOB DESCRIPTION – INDEPENDENT FINANCIAL ADVISER

<b>Job Title:</b>	IFA		
<b>Reports to:</b>	Client Services Director		
<b>Department:</b>	Client Services		
<b>Location:</b>	Various North West Locations (Head Office Manchester City Centre)	<b>Date of Job Description</b>	January 2020
<b>Purpose of the role:</b>	Experienced financial planner to provide a first class service to Pareto clients and Introducers.		
<b>Key Duties</b>	<ul style="list-style-type: none"> <li>• Working with professional Introducers – Accountancy Practices</li> <li>• Working within your support team of Paraplanners and Administrators</li> <li>• Private client (HNW) and Corporate advice</li> <li>• 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</li> <li>• Corporate advice – Group Risk; Group Pension; Auto Enrolment; Protection</li> <li>• Business Development</li> </ul>		
<b>Skills &amp; Experience</b>	<ul style="list-style-type: none"> <li>• Currently or previously worked within an IFA environment dealing with High-net worth clients.</li> <li>• Excellent communication, interpersonal and listening skills;</li> <li>• The capability to explain complex information simply and clearly;</li> <li>• The ability to network and establish relationships with clients;</li> <li>• Research and analytical skills;</li> <li>• Negotiation and influencing skills as well as determination and tenacity;</li> <li>• The ability to work in a team;</li> <li>• Time management skills;</li> <li>• Customer service skills;</li> <li>• Self-motivation and organisation;</li> <li>• A good level of numeracy and it skills;</li> <li>• A target-driven mind-set;</li> <li>• A flexible approach to work;</li> <li>• Decision-making skills;</li> <li>• Discretion and an understanding of the need for client confidentiality;</li> <li>• An ethical and professional approach to work.</li> </ul>		
<b>Education / Qualifications:</b>	<ul style="list-style-type: none"> <li>• Competent Adviser Status (CAS) - desirable</li> <li>• Minimum Level 4 Diploma QCA</li> <li>• Preferably working towards Chartered</li> <li>• Driving Licence</li> <li>• Clean CRB</li> </ul>		

<b>Reward Package</b>	<ul style="list-style-type: none"> <li>• Competitive Salary</li> <li>• 35 hours per week</li> <li>• 25 days holiday plus Bank Holidays.</li> <li>• Loyalty days with continued service.</li> <li>• Christmas Closure</li> <li>• Quarterly Bonus Scheme</li> <li>• Perkbox Scheme</li> <li>• Pension</li> <li>• Private Medical Insurance</li> <li>• Life Assurance</li> <li>• Fully funded company social events – summer and winter</li> <li>• Generous Study/Training Program</li> <li>• Personal Development Plan; Quarterly 1:1 meetings and Annual Appraisal System</li> </ul>
<b>The Company</b>	<ul style="list-style-type: none"> <li>• 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.</li> <li>• Winner of The Talk of Manchester Business Awards – Best IFA</li> <li>• We value our people; now employing 52 people – recently boosted its turnover to over £4 million. This has led to new clients and total funds under influence being more than £750 million.</li> <li>• Company growth is 20% year on year.</li> <li>• 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.</li> <li>• Great atmosphere, team spirit and thoroughly enjoyable working environment.</li> <li>• Organised social events calendar for all who want to participate.</li> <li>• Good work/life balance structure in place.</li> <li>• Dedicated to various charities throughout North West.</li> </ul>
<b>To Apply</b>	<ul style="list-style-type: none"> <li>• Internally – Internal Application Form to HR</li> <li>• Externally – CV to <a href="mailto:careers@paretofp.co.uk">careers@paretofp.co.uk</a></li> </ul>