

## JOB DESCRIPTION – INDEPENDENT FINANCIAL ADVISER

<b>Job Title:</b>	Independent Financial Adviser		
<b>Reports to:</b>	Sales Manager		
<b>Department:</b>	Client Services		
<b>Location:</b>	Various North West Locations (Head Office Manchester City Centre)	<b>Date of Job Description</b>	April 2022
<b>Purpose of the role:</b>	<p>Pareto is an award-winning financial planning firm. At the heart of our business is a clear and succinct purpose – to provide a positive client outcome in everything we do. We partner with our clients offering expert financial advice to help them plan for their best financial future.</p> <p>As a member of our advisory team, you will join like-minded professionals continually focused on sharpening their skills and knowledge so we can remain at the top of our industry. We believe in the importance of financial advice and how we provide it.</p>		
<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) advice: <ul style="list-style-type: none"> <li>– Protection</li> <li>– Investments including Direct/ISA/Onshore Bond/Offshore Bond/Structured Product/VCTs/EIS</li> <li>– Pensions including PPs/FAD/Annuity/ SIPP/SSAS</li> <li>– IHT and Trust Planning</li> </ul> </li> <li>• Corporate advice: <ul style="list-style-type: none"> <li>– Group Risk</li> <li>– Group Pensions</li> <li>– Corporate Protection</li> <li>– Corporate Investments</li> </ul> </li> <li>• Business Development</li> <li>• Relationship Management</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>• Good business development skills</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) - essential</li> <li>• Minimum Level 4 Diploma QCA</li> <li>• Chartered Financial Planner or working towards Chartered status</li> <li>• Driving Licence</li> <li>• Clean CRB</li> </ul>
<b>Reward Package</b>	<p>We are powered by our people. They are what brings Pareto to life and what makes our company one of a kind beyond the services we offer. We are committed to progressing, empowering and celebrating our people and offer a generous reward package which includes:</p> <ul style="list-style-type: none"> <li>• Competitive Salary</li> <li>• 35 hours per week</li> <li>• 25 days holiday plus Bank Holidays, and an Additional Birthday Holiday</li> <li>• Long Term Service Benefit Enhancements</li> <li>• Christmas Closure</li> <li>• Competitive Bonus Scheme</li> <li>• Perkbox Scheme</li> <li>• Pension</li> <li>• Private Medical Insurance</li> <li>• Death in Service</li> <li>• Fully Funded Summer and Winter Social Events</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>	<p>Since being founded in 2008, Pareto Financial Planning has seen company growth of 20% year on year. We currently have over £1 billion in Assets Under Management on behalf of thousands of diverse clients and we manage employee benefit solutions for over 500 companies.</p> <p>We are a friendly team of over 60 experts all working with one common goal in mind; to deliver a positive outcome in everything we do. In addition to our competitive rewards package:</p> <ul style="list-style-type: none"> <li>– We are committed to <b>career development</b> - providing an excellent in-house training program to support this with a generous study scheme and Personal Development Plan</li> <li>– We operate a <b>hybrid working</b> model</li> <li>– We <b>celebrate diversity</b> and are committed to creating a diverse and inclusive organisation</li> <li>– We have an active Culture &amp; Values Committee who work hard to create a <b>positive and healthy culture</b> within our organisation</li> <li>– We are <b>committed to our community</b> - we support various charities throughout the Northwest and have an employee nominated Charity of the Year and a quarterly Community Funding Scheme</li> <li>– We <b>plant a tree for every employee</b> every six months via Manchester City of Trees</li> <li>– We make conscious changes with <b>corporate responsibility and environmental sustainability</b> in mind, these are reported on in our annual Social Impact Report.</li> </ul>
<b>To Apply</b>	<ul style="list-style-type: none"> <li>• Internally – Internal application form to HR</li> <li>• Externally – CV to HR@paretofp.co.uk</li> </ul>