

Description of Responsibility

Role:	Employee Benefits Adviser
Pareto Department	Employee Benefits
Reports into:	Head of Employee Benefits
Location	Manchester
Role Description Version Effective Date:	External JDEB001- March 2024

Role Overview

EB adviser, providing employee benefits advice to existing corporate clients, managed within the Pareto Employee Benefits Department. Initially the role will have a predominately desk based support with some face to face when needed. There will be an expectation of growth into field where appropriate.

The role will be predominately existing clients with the opportunity to cross sell other lines of services and increase portfolio income.

Technical, sales and relationship management skills to be developed over a 12-24-month period to prepare for a possible move to established field-based adviser status.

Overall Responsibility – Employee Benefits Adviser

Key Duties
<p>This involves:</p> <ul style="list-style-type: none"> ⇒ Working with existing clients to conduct regular client reviews and develop new business opportunities. ⇒ Generating client referrals from existing clients. ⇒ Providing outstanding levels of service to clients and introducers. ⇒ Achievement of agreed client review targets. ⇒ Develop technical and sales skills through examinations, training and working with existing advisers. ⇒ Adherence to the company's ethics and compliance procedures.
Skills & Experience
<ul style="list-style-type: none"> ⇒ Experience within a similar role, ideally within an Employee Benefits, IFA, pensions or regulated environment ⇒ Experience in Group risk and health and (or) pensions where possible or open to training around pensions to become a wider EB consultant with the ability to discuss across all benefits. ⇒ Excellent communication, interpersonal and listening skills. ⇒ 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. ⇒ Discretion and an understanding of the need for client confidentiality ⇒ The capability to explain complex information simply and clearly. ⇒ The ability to network and establish relationships with clients.

Skills & Experience (Cont'd)
<ul style="list-style-type: none"> ⇒ Self-motivation and organisational skills ⇒ A good level of numeracy and it skills ⇒ A flexible approach to work ⇒ Decision-making skills ⇒ A target-driven mind-set
General Housekeeping
<ul style="list-style-type: none"> ⇒ Adhere to Clear Working Desk Policy, responsibility both as an individual and for your respective team. ⇒ Adhere to Company H&S policy. ⇒ Adhere to Company Procedure and Policies at all times. ⇒ Represent the company in a professional manner at all time. ⇒ Any other duties as and when required by the Company.
Education/Qualifications
<ul style="list-style-type: none"> ⇒ Ideally, Diploma qualified in Regulated Financial Planning ⇒ Competent Adviser Status (CAS) desirable

About the Company/Reward Package

Pareto
<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. ⇒ A Financial Times Top 100 UK financial adviser firm in 2023. ⇒ Best Financial Advisers to Work For 2024 by Professional Adviser and Best Companies. ⇒ We value our people; now employing a team of 68. This has led to new clients and total funds under influence being more than £1 billion. ⇒ We have an active Culture & Values Committee who work hard to create a positive and health culture within our organisation. ⇒ 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 the Northwest.
Reward Package
<ul style="list-style-type: none"> ⇒ Competitive Salary ⇒ 35 hours per week ⇒ 25 days holiday plus Bank Holidays. ⇒ 1 x holiday- Birthday holiday ⇒ Loyalty holidays with continued service. ⇒ Christmas Closure (need to retain 3 days from allowance) ⇒ Profit Sharing Scheme ⇒ Perks Benefit Scheme ⇒ Pension (auto-enrolment, then increasing dependent on length of service. ⇒ Private Medical Insurance (after 12 months) ⇒ Life Assurance ⇒ Long Term Service Awards ⇒ Fully funded company social events – summer and winter ⇒ Generous Study/Training Program