Job Title: Paraplanner

Job Overview

This is a fantastic opportunity for an ambitious individual to join an award-winning team of Chartered Financial Planners in a paraplanning role.

You will have the opportunity to deal with a wide variety of clients including business owners and professionals with scale and complexity, winners of the NS&I Premium Bonds £1m Jackpot prize winners and clients in vulnerable circumstances.

Key Responsibilities

The primary responsibility is to providing support to the Chartered Financial Planners in technical matters, allowing them to focus on client relationships and business development. This may include:

- Obtaining information from clients and product providers.
- Preparing and updating a client's personal financial planning file
- Preparation of client financial plans, financial analysis, and suitability reports.
- Preparation of other documentation required to support advice, including investment analyses, illustrations, and the disclosure of costs and charges.
- Research on investment product providers, typically using Defaqto Engage.
- Research on financial protection products, typically using IRESS exchange.
- Writing letters to clients outlining any changes that have been recommended by financial planners during annual review.
- Reviewing investment portfolios, asset allocation and risk profiles.
- Preparation of cashflow forecasts and financial planning reports
- Monitoring and making alterations to client portfolios as instructed.
- Implementation of chosen investment strategies.
- Assist in tax aspects of financial planning.
- Produce pension transfer reports and other documentation to facilitate advice on pension transfers.
- Carry out financial planning calculations including fund alterations, yield analyses, inheritance tax calculations etc.
- Acting as a point of contact for technical queries from clients, professional connections, and other parties.

Other responsibilities

- Assisting with any compliance matters and maintaining a current knowledge of any changes in FCA framework.
- Helping to promote the profile of the business within the profession and wider communities.
- Managing the presentation of technical data.
- Monitoring fund performance.
- Develop relationships with legal and tax advisers, and other professional connections.
- Continuous professional development to meet regulatory requirements and personal

development needs.
- Assisting with marketing and communications, including writing technical blogs, issuing newsletters, updating social media, and supporting workshops and seminars.

Qualifications/Experience

The ideal candidate would have attained the CII Level 4 Diploma in Financial Planning (or has made good progress and committed to further development) and have at least 2 years' experience working within the financial services professions. Experience in writing suitability reports, or using Defaqto, IRESS, Morningstar Adviser Workstation, O&M and SelectaPension is desirable.

However, we will consider applications from candidates with less or greater experience and qualifications.

The starting remuneration package will be determined by your level of experience and qualifications.

Other Points

Matrix Capital are keen advocates of professional development and would support the right candidate to extend their qualifications to the Chartered Financial Planner level and beyond.

Due to the rural office location, your own vehicle and a full UK driving licence is essential.

How to apply

Please send your CV or pen portrait to our Practice Manager, Jackie Killen:

Email: jackie@matrixcapital.co.uk

Fax: 01746 712901

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