EValue Powering financial insight

JOB TITLE – Paraplanner

Job Description

Position: Paraplanner
Hours: 9am - 6pm
Days: Monday to Friday
Hours: Full time; 40 hours a week or Job Share/Restricted hours considered
Location: Newbury, Berks

Purpose of the role

As a member of the One Financial Adviser Ltd team reporting to the Executive Director, the job-holder will be responsible for helping an digital advice service deliver a fully automated and compliant personalised advice service to end users.

Responsibilities

- Checking and signing off streamlined, simplified financial advice (CF30 authorisation and competent adviser status will be required within 6 months. Support will be given to achieve this)
- Updating standard paragraphs and templates
- Updating information and guidance on a range of financial advice related topics
- Other technical research and ad hoc documents to be produced as required
- Assisting customers with day to day queries and resolving any issues with their suitability reports or related administration
- Contributing to ideas and ongoing improvement of the service

The job-holder will be responsible for contributing to the successful delivery of the One Financial Adviser's team ongoing objectives. This will involve:

- Helping to maintain and communicate the product roadmap and release plans
- Adhering to compliance and operations policies and procedures at all times.

Skills and Experience

Experience

- Chartered Status desirable. DipPFS as a minimum with CPD maintained from passing to date.
- 3+ years report writing and research experience
- Confident with pensions and pension benefits
- First-hand experience of pension switches and pension benefit administration
- Able to work independently

Technical and other skills required

- Ability to learn quickly and a continual willingness to expand knowledge
- A proactive, entrepreneurial, self-starter attitude
- Ability to write in a clear and concise manner for a non technical audience
- Ability to assimilate new information and understand commercial and technical implications
- Good Microsoft Office skills, especially Excel, Word, Outlook
- Experience of or interest in fintech/actuarial/robo-advice sectors desirable

Essential Competencies:

Teamwork

- Offers assistance to colleagues; is widely regarded and respected as someone to go to for help
- Collaborates and interacts without regard to title, level or position
- Fosters friendly and cooperative relationships

Professionalism & integrity

- Makes a positive impression; represents the company well at all times
- Evaluates lessons learned from both successes and failures
- Demonstrates willingness to make commitments based on all information known at the time and delivers upon those commitments
- Adheres to all corporate policies, makes prudent use of company resources and acts with complete integrity in all matters
- Adheres to the ethical code of the Chartered Insurance Institute or similar professional body (such as CISI).

Communication

- Good interpersonal and communication skills (written and verbal)

- Confident communicating with customers via email, Skype and telephone

Business acumen

- Understands internal and external customer requirements

Decision Making

- Numerate with analytical skills

Problem Solving

- Enjoys problem-solving and working towards continuous improvement.