

Job Description - Paraplanner

Why work for FPC?

Our clients tell us that FPC is more than an IFA and we're proud of that! We have a reputation for excellence in the North West and beyond, but we're not complacent.

Feedback from our team suggests that we do things differently here too. As a Paraplanner at FPC you'll have the opportunity to provide a more holistic financial planning solution, with access to a hub of knowledge, built up by the firm's Partners for over 30 years. In short, it's not a typical Paraplanner role.

Our approach, together with a diverse and loyal customer base, a talented team and exciting career prospects makes being a Paraplanner at FPC a great opportunity for someone who shares our ethos.

If you're looking for a Paraplanner role with a difference, then a career at FPC could be for you.

A Day in the Life of an FPC Paraplanner:

- **Analysis** - full analysis of clients' requirements, development of cash flow models and accurate recording of client data
- **Solutions** - construction of financial planning solutions (investment, retirement, tax and estate planning) supported by the production of computer models and reports
- **Recommendations** - preparation of letters and reports (liaising with administrators), taking full responsibility for the client files and back office IT records throughout the advice process
- **Reviews** - preparation of client reviews, updating cash flow models, investment performance reviews and production of supporting reports, discussion documents and computer models
- **Relationship Building** - liaison with clients by telephone, letter, email and attending meetings
- **Coordination** - working with administrative staff to ensure application and provider forms are prepared as required and clients are updated throughout the process
- **Partners** - working with other professional advisers eg. solicitors and accountants to implement an agreed action plan

About you:

You will need:

- Chartered Financial Planner status (preferred)
- A minimum of a Diploma in Financial Planning
- A minimum of 4 years industry experience
- Excellent administrative, research, report writing and communication skills
- Excellent analytical skills with a preference for working in a structured, planned manner

Salary & Benefits:

Salary: From £35,000 to £45,000 per annum + benefits + salary progression ladder (rewards for exam success)

Hours: Permanent, full time, flexible working

Think you've got what it takes to join the team? Contact:

Bernice Blundell
Email: bernice@fpc.co.uk