Job Title:	Paraplanner	Position Type:	Full Time

Applications

Attention: Anthony Hoskisson **Email:** info@questachartered.co.uk	**Mail:** Questa Chartered Questa House Croft Court Plumpton Close Blackpool FY4 5PR

Job Description

Role and Responsibilities

- Providing support to our firm's advisers in completing non-client-facing tasks in relation to the preparation and administration of recommendations being made
- Liaising with advisers as appropriate
- Acting as a main point of contact for clients
- Dealing with client queries in an efficient and timely manner
- To attend client meetings as required or attend a debrief with the adviser following a client meeting to get a better understanding of the client's needs and objectives.
- Ensure all the compliance paperwork is present in the client file.
- Making sure any updates and reports are issued to clients in a timely manner.
- Ensure the client's attitude to risk and capacity for loss has been established.
- Identify areas for planning and obtain the information necessary to compile a recommendation report by liaising with product providers.
- Carrying out research and analysing products and services that are appropriate to each client's financial circumstances.
- Reviewing client investment portfolios, asset allocations, risk profiles etc., when requested
- Proposing and drafting financial solutions that meet each client's goals, needs and objectives.
- Undertake the necessary research to identify suitable solutions to meet the client's needs.
- Liaise with the client's tax specialist or solicitor as required.
- Prepare client-specific illustrations.
- Prepare suitability reports in accordance with the agreed recommendations.
- Assist the administration team with the completion of the relevant paperwork and proposal submissions.
- Liaise directly with clients to keep them updated on the progress of their case.
- Prepare existing client files for review.
- Assist with the company's due diligence on product providers and platform providers.
- Responsible for own individual workflow and task delivery.
- Responsible for keeping up to date with legislative and industry changes.
- Making sure you follow relevant advice and sales procedures at all times.
- Making sure all client contact is carried out in a professional and courteous way.
- Making sure all client files are compliant on an ongoing basis.

- Making sure all client records are retained in line with the firm's Date security / data protection / record keeping policy.

Qualifications and Education Requirements

Ideally, candidates should be level 4 diploma qualified, although candidates who are working towards their level 4 diploma with relevant experience will be considered.

Essential Skills

- Broad knowledge of the financial services sector.
- High level of technical knowledge.
- Understanding of the financial planning process.
- Have a good work ethic.
- Have the ability to work independently or as part of a team.
- Good report writing skills.
- Good IT Skills.
- Have the ability to prioritise workloads and work within set timescales.
- Have attention to detail.
- Excellent interpersonal skills, both written and verbal