

# Senior Technical Paraplanner

Hazlewoods

## Financial Planning - Staverton

Hazlewoods Financial Planning team are a team of 20, including four Partners and has been recognised by FT Adviser as one of the Top 50 firms for financial planning in the UK.

Our advisers are qualified to Level 6 chartered status and our technical team to Level 4 diploma level (with many working toward their level 6 chartered status).

The successful team is growing and looking for a Senior Technical Paraplanner.

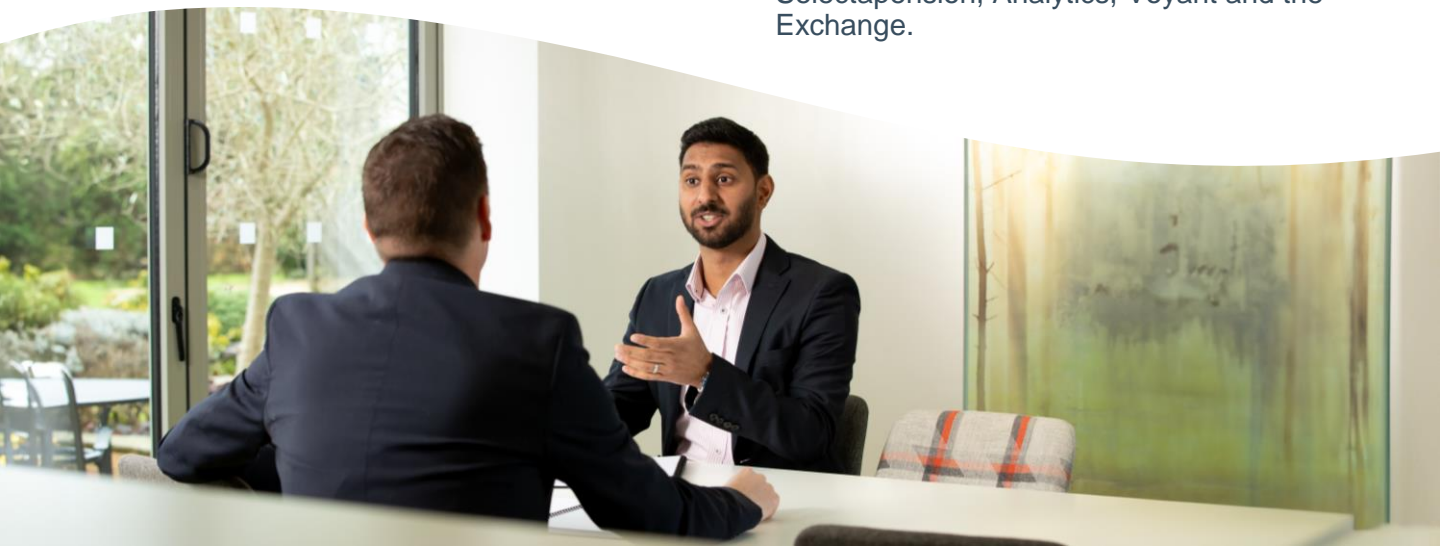
It's an exciting time to join Hazlewoods Financial Planning at **Staverton**.

### The right person will:

- Prepare recommendations and write financial planning reports for a broad range of financial planning topics
- Work collaboratively with the financial planners to create bespoke planning solutions for new and existing clients.
- Help deliver the highest standards of client care.
- Liaise directly with clients, some of which are Ultra High Net Worth.
- Work alongside the administration team to provide technical assistance with regards to any new business or servicing of existing clients.
- Draft research documents and presentations to promote the firm and explain complex technical issues in a simple manner.
- Ensure administrative and compliance processes are followed to required timescales.

### You will thrive in this role if:

- You have at least five years' Financial Services experience, with the majority of your time in a paraplanning role.
- You have the full Diploma (essential) and are making some progress towards the advanced diploma (desirable).
- You have relevant and recent experience of dealing with either IHT planning or personal protection. Both pre- and post-retirement planning experience is essential.
- You have a working knowledge of research/planning tools such as Micap, Selectapension, Analytics, Voyant and the Exchange.



- You are accurate, with a methodical approach and a keen eye for detail and have excellent compliance knowledge.
- You are enthusiastic, with a positive attitude and use your initiative.
- You are chartered or working towards chartership (desirable)
- You are willing to take on extra responsibility and tasks where appropriate/available.
- You are very flexible and must be able to manage numerous tasks at the same time, whilst remaining focused, ensuring projects are completed on timely basis and to deadline.
- You have a working knowledge of Microsoft Office software, including specifically excel.
- You appreciate the 'team approach' working as part of a small team. Every member of the team has an important role to play in the effectiveness of the business and an appreciation of this is essential.

