

Private Client Desk Based Adviser

Locations available: Scotland (Home, Hybrid or Office based), North England (Home based), East England (Home based), South East (Home, Hybrid or Office based), West England (Home based)

Salary: Competitive salary, bonus and outstanding flexible benefits package

Job Brief

Continued success has led to a strong pipeline of work and we are looking for financial advisers to join our expanding specialist team to proactively service leads provided by Origen as part of various Pension Liability Management projects that have been acquired to deliver defined benefit advice. We are award winning national advice company and you will be part of a team that strives to deliver best advice and recommendations to our clients. The ideal candidate will be experienced in providing defined benefit advice, self-motivated to ensure all revenue targets are met and work is completed in a compliant manner and meets the company's quality standards. We have the flexibility to enable our Advisors to be based nationwide.

Main Responsibilities

- Provide financial advice and guidance across a variety of PLM areas to members of large blue chip corporate deferred DB schemes; Pension Increase Exchange (PIE), Enhanced Transfer Values (ETV's) and Flexible Retirement Options (FRO)
- Assess client's overall financial picture, understand their needs and develop a solid financial plan
- Cultivate client base and build win-win relationships
- Keep abreast of industry's trends and research market to back up financial consulting
- Comply with FCA rules and guidance and our Training and Competence regulations
- Network and generate leads with solicitors, and other professionals

Candidate Requirements

- Diploma qualified Financial adviser with proven work experience as a Financial adviser or other relevant experience i.e. Paraplanning
- AF7 or equivalent, or studying towards AF7 or equivalent.
- Strong organisation and communication skills
- Accuracy, attention to detail and the ability to explain complex information clearly and simply is key
- Client focussed
- Excellent PC skills and ability to operate database systems

Interview Process

1st Stage = Coffee Chat

2nd Stage = Competent Advisor Test

3rd Stage = Competency Based Interview and Role Play

How to Apply

To apply for this role please click on the **Apply** button below.

APPLY NOW