

FINANCIAL PLANNER

Salary Range - £35,000 to £45,000 basic per annum plus a range of benefits including bonus and car allowance.

The Business is always looking to expand and develop its Financial Planning Team by recruiting exceptional, fully qualified Financial Planners with at least 5 years' experience of advising high net worth clients and a proven track record of acquiring and developing new business.

Key knowledge, skills and experience required

- Diploma in Financial Planning or equivalent and ideally having achieved Chartered status, or be able to demonstrate significant evidence of progress towards Chartered Status as a minimum.
- Minimum of 5 years' experience of advising high net worth clients and evidence of acquiring and developing new business.

Responsibilities

Boolers has developed a diverse and loyal client base often keeping clients for many years and advising from one generation to another. Advice is client focussed with recommendations being tailored to individual needs.

The nature of the role will be to provide a high quality financial planning advisory service to both existing and prospective clients. In addition, you will be expected to explore and progress business development initiatives to acquire new clients. There is a significant amount of support available through Account Executives and Administrators with the Business providing a Support Staff/Financial Planner ratio far higher than the industry average.

As an authorised individual you will be qualified to provide comprehensive financial planning advice and be able to demonstrate a strong involvement in the SIPP and SSAS market place as well as a sound understanding of discretionary management of Investments.

Principal Terms and Benefits.

- Basic salary range: £35,000 to £45,000
Remuneration and benefits subject to qualifications, experience and proven business development record
- Bonus scheme
- Car allowance
- Mobile Phone and laptop
- 2 x salary life assurance
- Private Medical Insurance

- Pension - 5% employer contribution with incremental progression in recognition of long service. Personal contribution not compulsory
- 24 days' holiday, increasing incrementally in recognition of service, plus statutory holidays
- Childcare assistance programme
- Free on site parking