

## **Sales Manager – Private Client**

*Dorset / Hampshire - To £85,000 + benefits and bonus*

Ref: 4636

My client is a leading provider of advisory services throughout the UK. This is a key management role to support and deliver a successful fee based financial planner and wealth management team. You will need to inspire, motivate and manage the adviser team, strive to achieve team objectives and expectations, create new business opportunities and enable business development. You will be involved in the recruitment of the adviser team, build and implement a business plan and make sure its achieved. You must be at least Diploma level, preferably Chartered status, have proven skills in the leadership of a team and the ability to network and develop the business and team.

## **Wealth Financial Planner**

*City - £45,000 - £60,000 + benefits inc pension, DIS and discretionary bonus.*

Ref: 4613

My client is a long established independent investment management company dedicated to the maintenance and preservation of the asset base and wealth of its clients. They are looking to recruit an experienced consultant with strong pensions experience and a good all round knowledge of other planning subjects, ideally with cash flow modeling capability. This is a team role and whilst you will have first lead on a number of clients you will be working closely with the discretionary investment managers and advising a range of financial planning advice including VCT's and EIS's.

## **Senior Paraplanner**

*City - Up to £60,000 depending on experience*

Ref: 4608

My client is an established and very successful practice providing a wide range of expertise and knowledge in financial planning advice and wealth management for HNW and UHNW clients. Working with two partners, this role is to build and manage a paraplanning service, mentor others and be responsible for the overall operational function. This is a challenging role so you must have leadership skills as well as in depth research and report writing experience. To qualify you must have at least 4 years' experience within the Professional or Financial Services sector and have strong technical knowledge including the pension transfer market. The Diploma must be attained as a minimum and ideally you will also have AF3 or G60.

## **Senior Paraplanner**

*Manchester- To £40,000 depending on experience + benefits*

Ref: 4622

My client is an independent financial advisers in Manchester serving clients throughout the UK and overseas and advising on retirement advice, tax efficient investment, risk management and insurance as well as estate planning. The role will focus, although not exclusively, on DB pension transfer business, assisting the MD on cases gained from intermediaries as well as their UK and international advisers. You could be an experienced paraplanner or someone looking to move into paraplanning but with a background of working in financial services for an IFA or as an IFA.

