Perspective is a national financial planning and wealth management group which operates from 20 offices across the UK employing over 250 staff, including over 80 highly qualified advisers. It provides impartial, specialist advice for individuals, corporates and trustees on pensions, retirement planning, inheritance tax planning, investments and group risk and business protection matters, often working closely with other professional advisers such as accountants and lawyers.

The group differentiates itself by having a strong and ethical client-centric culture, a robust compliance approach and a clear focus on developing its pipeline of trainee adviser talent through its workplace based in-house Training Academy.

CBPE Capital LLP made a major investment in Perspective to support the Group's management team with their continued focus on providing high quality advice to their existing client base, growing organically and making selective acquisitions.

Perspective has gained a reputation as the 'acquirer of choice' for Financial Planners looking to retire and exit the industry and for larger Financial Planning firms looking to join an established and growing industry leading group.

Trainee Data Analyst (ref: 162)

Location: Newcastle
Hours: Monday – Friday 9.00am – 5.00pm (35 hours)
Salary: £19,000 Dependant on experience and qualifications, plus Bonus
Benefits: 25 days holiday (rising with length of service) plus Bank Holidays, Holiday Purchase Scheme, Life Assurance, Pension and Corporate Eyecare

Role Description:

We have a fantastic vacancy for a Trainee Group Data Analyst to join our friendly and enthusiastic team in Newcastle. The successful candidate will provide support and assistance to the Group Data Analysis Manager in producing the Group's day to day reporting needs, while ensuring the data held is accurate and up to date.

Specific Responsibilities:

The key duties of the role are listed below:

➢ Assisting in monthly reporting to the local offices
➢ Support with the day-to-day reporting needs
➢ Data cleansing work
➢ Back-office support
➢ Assist in the continuing development of commercial reporting
➢ Administrative support to the Group Data Analysis Manager
➢ Data entry work as required
➢ Due to the nature of the business, the role may also include additional responsibilities considered reasonable

Experience & Skills:

The role requires a reliable individual who has the ability to manage and prioritise workloads.

Perspective's flexible and pragmatic approach means we can create mutually beneficial acquisition deal structures and completion timescales, while priding ourselves on delivering a client-centric, ethical approach focused on long term (often multi-generational) client relationships.

Privacy Policy

Perspective Financial Group Ltd ("us", "we") respects your right to privacy. Our Privacy Policy explains who we are, how we collect, share, and use personal information about you, and how you can exercise your privacy rights. Our Privacy Policy is available on our website https://www.pfgl.co.uk/privacy-policy/

Key requirements are:

- ➢ Good working knowledge of IO and Platform experience essential.
- ➢ Excellent planning, organisational and multi-tasking abilities are essential
- ➢ Excellent communication skills at all levels
- ➢ Ability to produce concise business correspondence, proofread for grammar, spelling and punctuation with a high degree of accuracy
- ➢ Analytical and problem-solving skills
- ➢ Flexibility/ adaptability to cope with change
- ➢ Confident with IT and office software packages including Teams, Outlook, Word, Excel and PowerPoint
- ➢ A team player with a positive attitude who can build and maintain good working relationships

How to apply

Please send your CV and cover letter to recruitment@pfgl.co.uk quoting Trainee Data Analyst (ref: 162)