

Perspective is a national financial planning and wealth management group which operates from 21 offices across the UK employing over 275 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.

## Paraplanner (ref: 179)

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**Location:** Chesham

**Hours:** Monday - Friday 9.00am - 5.00pm (35 hours)

**Salary:** £35,000 - £45,000 Dependant on experience and qualifications

**Benefits:** 25 days holiday (rising with length of service) plus Bank Holidays, Holiday Purchase Scheme, Life Assurance, Pension and Corporate Eyecare

### Role Description:

The successful candidate will work closely with our Financial Advisers by providing technical support in the process of servicing our Clients' Financial Advice needs, instinctively providing excellent standards of client service, and conduct detailed research on clients' existing and potential arrangements. After assessing these against the client's financial objectives, you will produce timely and compliant Financial Planning Reports

### Specific Responsibilities:

The key duties of the role are listed below:

- Writing Financial Planning Reports that our Advisers present to clients
- Supporting the Advisers by conducting research on products and helping find the right solutions for our clients
- Assisting with reviews and customer requests as well as acting as a point of contact for our clients to deal with day to day queries
- Arranging for plans to be submitted to provider companies
- Maintain client records on the company software and ensure the client and firm's files are well presented, accurate and compliant
- Preparation of client review packs
- Illustration requests
- Keep up to date with financial products and legislation
- Comply with all company and industry guidelines, rules and regulations
- Due to the nature of the business, the role may also include additional responsibilities considered reasonable

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/>*

### Experience and key requirements are:

The successful candidate will need to be motivated, friendly and professional at all times. Key requirements are:

- Experience in a Financial Advice firm and Paraplanner/ report writing skills is essential
- Diploma qualified is desirable but consideration will be made for candidates who have the relevant skills and experience to do the job.
- A reliable individual who has the ability to manage and prioritise workloads
- Outstanding communication skills at all levels
- Ability to produce business correspondence, proof read for grammar, spelling and punctuation with a high degree of accuracy
- Analytical and problem-solving skills
- Experience of working as part of a team
- Excellent organisational and multi-tasking abilities are essential
- Flexibility/ adaptability to cope with change
- Confident with IT and office software packages Word, Excel, PowerPoint

### How to apply

Please send your CV and cover letter to [recruitment@pfgl.co.uk](mailto:recruitment@pfgl.co.uk) quoting Paraplanner (ref: 179)

*Any unsolicited CVs will be sent at the recruitment agency's own risk and will be interpreted as 'gifts' and we have no liability to you for any fee or otherwise. We reserve the right to engage with candidates directly having not, in any way, entered into your terms and conditions. By submitting an unsolicited CV to us, or to any member of our staff, you accept these terms as the default position*