Perspective
MANAGING WEALTH

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 planners. 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.

Financial Planner (ref:184)

Location: Crystal Palace
Hours: Monday – Friday 9.00am – 5.00pm (35 hours)
Salary: 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:

You will provide clients financial advice and make recommendations on how to best meet their goals. The ideal candidate will be able to research the marketplace on available products and services, identify customers' needs, design financial strategies and gain commitment from clients to proceed with your recommendations.
The successful candidate will be an ambassador of Perspective (Thornton Springer) Ltd as the premier provider of quality financial solutions and establish relationships and new business from clients.

Specific Responsibilities:

The key duties of the role are listed below:

- Provide strategic advice across a variety of financial products and services (Pensions, Investments & Savings, Protection)
- Assess client's financial circumstances, understand their needs and develop a comprehensive financial plan
- Make recommendations to clients that meet their goals and ambitions
- Cultivate the client base and build relationships
- Keep abreast of new industry developments and research the market to ensure that knowledge is current
- Keep up to date with financial products and legislation and comply with all industry rules and regulations
- Due to the nature of the business, the role may also included 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 & Skills:

The successful candidate needs to be motivated, friendly and professional at all times. Excellent time management is a must to ensure appointments are scheduled with realistic time frames.

Key requirements are:

- Experience as a Financial Planner or relevant experience
- Qualified to Level 4 Diploma in Financial Planning as a minimum
- Accuracy, attention to detail and the ability to explain complex information clearly and simply
- Good knowledge of compliance, TCF, Data Protection Act and
- Anti-Money Laundering requirements
- Excellent communication skills and the ability to ask appropriate questions of clients
- Good analysis skills, money management skills and planning skills
- Should be enthusiastic and willing to assist clients
- Ability to manage own workload.
- Flexibility/ adaptability to cope with change
- Full driving licence and own car essential

Critical knowledge required:

- Knowledge of FCA rules relating to the financial advice process.
- Working knowledge of Compliance
- Knowledge of the current market place

How to apply

Please send your CV and cover letter to **recruitment@pfgl.co.uk** quoting **Financial Planner (ref:184)**

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