Perspective
MANAGING WEALTH

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 Financial 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 financial planner talent through its workplace based in-house Training Academy.

The Six Values that have helped shape Perspective into the firm it is today are:

- We are client-centric
- We will do the Right Thing
- We always deliver
- We become a trusted member of the family
- We continually set standards of excellence
- We believe in teamwork

Watch our short video on our values here:
https://www.pfgl.co.uk/about-us/our-values/

Training and Development Manager (ref:188)

Location: Flexible
Hours: Monday – Friday 9.00am – 5.00pm (35 hours)
Salary: Competitive - 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:

We currently require two highly motivated individuals with a friendly and confident manner to support the integration of processes and systems across the Group with particular focus on acquisitions. Candidates must have previous experience and understanding of back-office systems such as Volume, Intelligent office, and will need to be able to prioritise a demanding and time sensitive workload.

The ideal candidate will be a strong communicator with the ability to develop relationships. A key focus will be providing coaching/training across our processes as we integrate business and therefore previous experience in this area is required. Traveling across various offices will be required

Specific Responsibilities:

The key duties of the role are listed below:

- Allocate tasks and assignments, monitoring performance of adoption
- Manage internal relations
- Implement procedural and policy changes to improve operational efficiency
- Assess overall Operational performance against objectives and provide commentary where required
- Deliver training and development to ensure that all financial planning client administration is carried out in accordance with the firm's procedures
- Deliver training and development to ensure that we maintain client records on company software and that the client and firm's files are well presented, accurate and compliant
- Assistance with maintaining the high performance of office staff by providing them with adequate coaching and guidance
- Oversee training of new employees, completing inductions, Learning & Development and setting objectives
- Due to the nature of the business, the role may also include additional tasks considered reasonable

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.

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 role requires a reliable individual who can manage and prioritise workloads, so excellent organisational abilities are essential.
Thorough understanding of diverse business processes and strategy development.
Previous experience in coaching and developing teams is essential.

Key requirements are:

- Previous experience working in a Financial Planning firm is essential
- CII Level 3 Qualifications in Financial Administration preferable
- Experience of managing a team, providing guidance, coaching and monitoring performance
- Platform experience and a strong working knowledge of back office systems is essential. We use IO and Volume within our back office systems so knowledge in these areas would be preferred
- 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

How to apply

Please send your CV and cover letter to **recruitment@pfgl.co.uk quoting Training and Development Manager (ref: 188)**

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