

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/>

M&A Coordinator (ref:190)

Location: Home based, with travel as required (but preference for someone close to one of our 21 offices across the UK)

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

Salary: £24.5K to £26.5K 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 have an exciting opportunity to join our growth focused M&A Team at Group level as a Mergers and Acquisitions (M&A) Coordinator. The successful candidate will report to the Group Acquisitions Director and help coordinate all aspects of the Group's acquisition and integration strategy, planning and delivery.

Specific Responsibilities:

The key duties of the role are listed below. Due to the nature of the business, the role may also include additional responsibilities considered reasonable:

- Supporting the Group Acquisitions Director in the logging and management of pipeline acquisition targets and current opportunities, identifying information gaps and exceptions
- Monitoring and distribution of inbound acquisition opportunities
- Track and report integration progress including proactive identification of exceptions and potential issues
- Assisting with the collection, organisation and analysis of data from vendors and/or their representatives
- Helping coordinate a number of simultaneous acquisition and integration projects and communication streams with both internal and external stakeholders
- Liaising with providers, vendors and internal stakeholders on the preparation of letters, forms and other formal documentation

Experience, skills and key requirements:

The successful candidate needs to be motivated, friendly and professional at all times.

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/>

- Previous experience working in the Financial Services industry is essential and experience in client/plan novation and/or a provider agency team is desirable.
- Highly skilled user of Microsoft Excel, capable of the creation and maintenance of often complex spreadsheets and the analysis of data
- A reliable person who has the ability to manage and prioritise workloads and coordinate a number of simultaneous projects and communication streams
- Excellent organisational and multi-tasking abilities are essential
- Outstanding communication skills at all levels
- Ability to produce concise business correspondence, proof read for grammar, spelling and punctuation with a high degree of accuracy
- Analytical and proactive problem-solving skills
- Experience of working as part of a team and able to work remotely with colleagues often in virtual environments such as Microsoft Teams and Zoom.
- Requires someone with the credibility to hold conversations with internal and external stakeholders and the discipline to conduct research, collect and organise data and absorb information quickly in order to support the acquisition and integration process
- Flexibility/ adaptability to cope with change
- Confident with other IT and office software packages including Teams, Outlook, Word and PowerPoint

How to apply

Please send your CV to recruitment@pfgl.co.uk quoting **M&A Coordinator (ref: 190)**

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