

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/>

## Project Manager (ref:191)

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**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:** £30K to £35K 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 a fantastic opportunity for a Project Manager to join our growing and ambitious financial business to assist with the delivery of varied projects across the organisation. The successful candidate will report to the M&A Integration Project Manager and be responsible for the coordination and completion of projects. This role will include overseeing all aspects of projects, from setting deadlines, building project plans, assigning responsibilities, monitor and summarising progress of projects, and preparing reports for upper management regarding status of projects.

### 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:

- Coordinate internal resources and third parties/vendors for the flawless execution of multiple projects
- Ensure that all projects are delivered on-time, within scope and within budget
- Assist in the definition of project scope and objectives, involving all relevant internal stakeholders and ensuring technical feasibility
- Develop comprehensive project plans to be shared and used for monitoring and tracking project progress
- Manage changes to the project scope, project schedule, and project costs
- Report and escalate risks, issues, and assumptions to management as needed
- Manage the relationship with the clients / relevant stakeholders
- Perform risk management to minimise potential risks
- Establish and maintain relationships with third parties/vendors
- Create and maintain comprehensive project documentation (spreadsheets, diagrams, and process maps to document project needs)
- Meet with clients to take detailed project briefs and clarify specific requirements of each project

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/>*

- Develop and maintain strong working relationships with all stakeholders, internal and external, ensuring clear communication and updates are available and delivered to all relevant parties regarding the progression of each project on a frequent basis.
- Perform other related duties as assigned
- Perform lessons learned and take action where changes are required.

### Experience, skills and key requirements

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

- Proven working experience in project management
- Excellent client-facing and internal communication skills
- Excellent written and verbal communication skills
- Effective time management and organisational skills. The ability to prioritise and plan for self and others with the proven ability to lead projects with multiple stakeholders and achieve shared goals and results
- Solid organizational skills including attention to detail and multitasking skills
- Strong working knowledge of Microsoft Office and other Microsoft packages.
- Project Management Professional PRINCE2 certification (PMP or others are a plus)
- Experience with project management software tools
- Proactive and flexible; comfortable working in a dynamic business environment with constantly changing priorities
- Leadership and problem solving
- This role will require some travel within the UK

### How to apply

Please send your CV to [recruitment@pfgl.co.uk](mailto:recruitment@pfgl.co.uk) quoting **Project Manager (ref: 191)**

*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*