Aspect8

Chartered / Financial Planner

Job Description

Who we're looking for?

Following considerable growth in our business, we are looking for a number of talented Financial Planners to join our successful and award-winning firm of Chartered Financial Planners on an employed basis.

This is an exciting opportunity for an experienced financial planner to join a fast-growing advice firm who are committed to providing clients with access to the highest standards of holistic financial planning.

About Aspect8

We are a multi-award-winning Chartered financial planning firm with a client centric approach. In-house technology solutions, combined with market-leading discretionary fund management, enables us to deliver an outstanding holistic financial planning and wealth management service to our clients across the UK. We consider ourselves to be 'human with a digital touch.'

We are part of the Benchmark Capital Group, who power financial advisers through insight, integrated tools, services and investment solutions.

With a technology-led ecosystem of regulatory, platform, and investment services provided by Benchmark Capital, our approach is guided by delivering safety and security for clients whilst focussing on positive client outcomes. We believe that first-class client service and integrated technology are essential components for long-term success.

As part of the wider Schroders family, Benchmark Capital and Aspect8 are in the privileged position of being able to harness more than 200 years' experience in innovation and excellence.

At Aspect8 we are not just looking to build a team with the right qualifications – how we deliver is just as important as what we deliver. We are guided by the principles of creativity, quality, security, community and sustainability.

Where you'll be based

- You will be part of one of our regional office teams in Horsham, Winchester or Maidstone.
- We know that helping you balance personal and professional commitments is key to both your wellbeing and our shared success, so we're open to flexible working.

What we can offer you

- There's no need to bring clients. Whilst we provide clients for our advisers to service through our business acquisition and development strategies, we also have a comprehensive structure in place to help our advisers develop existing clients and attract new clients.
- We design our client service model around our clients' needs, using a combination of face-to-face meetings and digital tools.

- Our advisers enjoy comprehensive training, professional development and compliance support.
- You will also benefit from administrative and paraplanning support, enabling you to optimise the time spent serving your clients' needs.
- An attractive compensation and benefits package, a terrific working environment and a well-structured career path is on offer for our successful candidates.

The knowledge, experience, and qualifications you need

- You must be currently working as a Financial Planner, with a minimum of 3 years' experience within a Financial Advisory Practice (independent or restricted).
- The ability to analyse clients' financial needs and goals, to develop lifetime planning strategies and to proactively provide an ongoing advice service to our clients.
- The technical knowledge and experience required to provide high-quality advice across all aspects of financial planning, including tax efficient investment planning, pensions and retirement planning, protection and estate planning. A mortgage advice licence is not essential.
- Experience working with individuals and their families, entrepreneurial business owners, corporates, charities, specialist professions and managing professional intermediary clients.
- Additional specialisms in Pensions, Trusts and/or Long-Term Care and membership accreditation with professional bodies such as Resolution, SOLLA or STEP would be beneficial.
- Comfortable carrying out annual client reviews electronically or via face-to-face meetings.
- Excellent communication skills and high standards of literacy are essential.
- Committed to developing your professional skillset, ideally you will be Chartered or within a year of achieving Chartered Status.
- A thorough understanding of the Compliance, Legal, Statutory and Regulatory aspects impacting upon this area.
- Fully conversant with digital client meeting tools, such as Microsoft Teams, you will also possess solid systems experience with Microsoft 365, CRM and compliance systems.

What you'll be like

- Client focused, you will be a self-starter who is comfortable working in teams. Able to act on your own initiative and develop relationships with both new and existing clients and professional connections.
- Aspirational, you will be an individual who embraces change and understands and shares our corporate culture.
- Someone who actively contributes to the evolution of our business and its proposition through constructive client centric feedback.

We're looking for the best, whoever they are

Benchmark Capital is an equal opportunities employer. You're welcome here whatever your socio-economic background, race, sex, gender identity, sexual orientation, religious belief, age, or disability.

We look forward to meeting you.