Aspect8

Financial Planner

Job Description

Who we're looking for?

We are seeking to employ a number of Level 4 Diploma qualified Financial Planners for our client relationship team. This is a key strategic initiative for the group and an opportunity for the successful candidates to be part of an exciting new advisory team within the business.

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, differentiating our client proposition.

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

- Team members will be part of our regional offices 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. Our business development initiatives will comfortably provide you with a book of client families to service.
- All client interactions including regular client servicing and annual review meetings will be delivered through digital channels.
- Our advisers enjoy comprehensive training, professional development and compliance support.
- You will also benefit from administrative support, enabling you to spend more time focused on 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 2 years' experience in your current role including having held CAS for at least 12 months. You will also hold a valid SPS.
- The technical knowledge and experience required to provide high-quality advice across all aspects of financial planning, including tax efficient investments, pensions and retirement planning, protection and estate planning. Mortgage knowledge is not essential.
- 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.
- Committed to developing your professional skillset, you'll be studying towards becoming a Chartered Financial Planner.
- We are happy to consider advisers who may be relatively early in their careers and who are motivated to become a chartered financial planner, as well as those more experienced advisers who are looking for a wholly desk-based or digital client financial advisory proposition.
- Excellent communication skills and high standards of literacy are essential.
- 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

- A self-starter who is comfortable working in teams, with the ability to act on initiative and develop relationships with new and existing Aspect8 clients.
- The ability to prioritise and meet objectives in a timely manner.
- 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.