# Paraplanner Team Leader

## Job Description

### Who we're looking for?

We are looking for a Paraplanning Team Leader with at least 4 years' experience of working in a Financial Adviser firm, to join our successful and award-winning firm of Chartered Financial Planners and support the Financial Planners in their role.

### 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 the team based in Horsham.

− 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.

## Overall Purpose of the Role

As a key member of our client facing teams, your primary responsibility is to provide paraplanning support to our financial planning advisers in all aspects of their advice process and managing the paraplanning team.

Your role will be supporting for Chartered Financial Planners in all aspects of their advice process and managing the paraplanning team including the following:

- Analyse clients' financial needs and goals, to develop lifetime planning strategies and to proactively provide an ongoing advice service to our clients.
- Attend meetings with clients alongside advisers when required
- Carry out product and fund research using research tools including FE analytics, iPipeline and MiCAP
- Prepare cash flow modelling and pension income drawdown forecasts
- Prepare illustrations, recommendation reports and client correspondence to target deadlines
- Ensure all client work is compliant and supported with relevant paperwork
- Ensure all Suitability and letter templates are kept up to date
- Monitor team workflows ensuring there is clear oversight over individual capacity and performance
- Complete regular one to one's with all members of the paraplanning team and facilitate team meetings with minutes and recorded actions
- Provide new joiners a comprehensive induction and monitor/record the ongoing training requirements of the paraplanning and adviser team
- Identify strengths and areas of development within the team and organise structured training to improve knowledge base and skills within the team
- Encourage and support personal development, professional exams and progression within the support and wider teams as appropriate
- Liaise with advisers and support team, deal with any escalations in a timely and efficient manner
- Facilitate regular adviser forum encouraging open communication regarding working practices

## The knowledge, skills, experience, and qualifications you need

- Motivated and comfortable working in teams. Able to act on your own initiative and develop collaborative relationships with both advisers, clients, professional connections and your peers across the business.
- Ability to prioritise multiple tasks in a deadline driven environment, the ability to make decisions and to work calmly under pressure are all key attributes
- Minimum of 4 years' experience within a wealth management and/or financial planning business.
- Has attained CII Diploma in Regulated Financial Planning Level 4.
- Experience of managing people within a team is essential.
- Experience with Client Management Systems and 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

- You will be required to complete the range of educational and training tutorials on our internal client management and client asset custody and administration and dealing systems, Enable and Fusion, as well as be fully conversant with our online client portal, Wealth Platform.
- Aspirational, you will be an individual who embraces change and understands and shares our guiding principles or creativity, quality, security, community and sustainability.
- Actively contributes to the evolution of our business and its proposition through constructive client centric feedback
- Excellent telephone manner, communication skills and high standards of literacy are essential.

### We're looking for the best, whoever they are

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