



# Financial Planner

## Job Description

### **Who We're Looking For**

We are seeking to employ a Level 4 Diploma/Chartered qualified Financial Adviser to help us achieve our ambitious growth plans.

This is an exciting opportunity for an experienced financial planner to join an advice firm on an employed basis in multiple locations.

### **About Benchmark Capital**

Benchmark Capital powers financial advisers through insight and integrated tools, services and investment solutions that help them differentiate their client proposition.

Helping advisers to look after their clients is at the centre of everything we do. Our award-winning solutions support over 150 advice firms, with £17.1 billion of assets under advice<sup>1</sup>

With a technology-led ecosystem of regulatory, platform, and investment services, and our own financial planning business, our approach is guided by delivering safety and security for customers and focused on positive client outcomes.

We believe that first-class client service and integrated technology are essential components for long-term success. Our seamless, holistic approach works in harmony both to empower advisers and their clients and to generate tangible financial and competitive advantages.

We work with some of the most successful financial planning firms in the UK, bringing the power of technology to advice and wealth management

<sup>1</sup>As at 31.03.21

### **The base**

You could be based at our offices in Winchester, Horsham, Brighton or Maidstone.

We support our offices by using cutting edge software and hardware and our spacious campus facilities mean there's a great working environment for the team.

We know that helping you balance personal and professional commitments is a big part of that, so we're open to flexible working. Many of our staff work flexibly in many different ways, including part-time. Please talk to us at interview about the flexibility you need.

### **What You'll Do**

- Whilst office based, we work flexibly with a combination of office and home working. Client meetings are either office based or at a client's premises. We also work with clients on a digital basis through digital meeting mediums that are available.

- Whilst we provide clients for our advisers to service through our acquisition strategy, we have a comprehensive structure in place to help our advisers to develop existing and attract new clients.
- We provide comprehensive compliance support.
- We provide full administrative and para planning support to enable our advisers to focus on the activity that they are best at.

### **The Knowledge, Experience And Qualifications You Need**

- You must be currently working as a Financial Planner.
- We would expect a minimum of 2 years' experience in the role.
- Ideally you will be Chartered or within a year of achieving Chartered Status.
- You need to be experienced in advising clients on all aspects of financial planning, including investments, pensions and protection. Mortgage knowledge is not essential.

### **What You'll Be Like**

- The ability to act on initiative to develop relationships with new and existing Aspect8 clients.
- A willingness to embrace change.
- A level of Technical knowledge that will allow for the provision of a high-quality financial planning service.
- The ability to analyse financial needs and goals to develop lifetime strategies.
- Being comfortable carrying out annual reviews electronically or via face to face meetings.
- Demonstrate the right attitude and culture, objectives and priorities.
- Enjoy working as a team to improve and help move the business forward.
- A thorough understanding of the Compliance, Legal, Statutory and Regulatory aspects impacting upon this area.
- Excellent communication skills and high standards of literacy essential.

### **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.