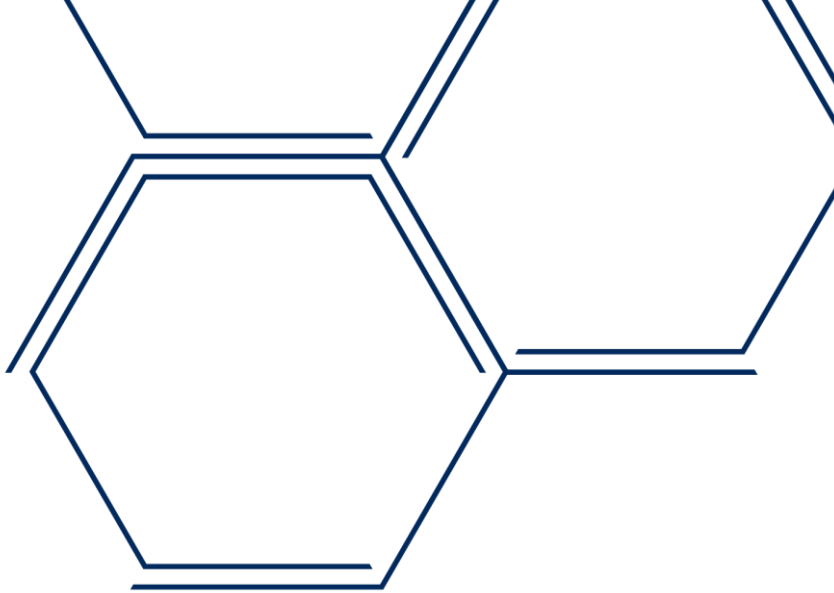


Paraplanner

Job Description



Who We're Looking For

Aspect8 are looking to recruit for a Paraplanner on a 6 month contract.

Paraplanning is a technical function that supports and informs the work of advisers in all areas of finance, including pensions, tax and investment management. This role is to support the advisers within the company / network.

It is not your role to give financial advice, but to produce letters, reports and supporting evidence for consideration. You are expected to undertake technical analytical work, which may include cash-flow forecasting and investment analysis.

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 advice¹

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

¹As at 31.03.21

The base

You'll be based at our Broadlands Business Campus near Horsham in West Sussex. It has high standards and international reputation, without being in the city: a big, countryside campus means life will feel a little different.

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. With an on-site restaurant, coffee shop and gym, our campus has much to offer. And commuters can relax on our dedicated regular shuttle bus to and from Horsham's main line train station.

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

- Preparing and maintaining the paraplanning client file (electronic based files).
- Discussing client objectives and work requirements with the adviser.
- Completing research, analysis and data gathering (including liaising with providers and collating information on investments, pensions and other products, as applicable).
- Sourcing quotes and accompanying client disclosure material (Key Features Documents etc.) and saving to client file.
- Drafting Suitability Reports. This will involve the use of Financial Planning software tools, such as Selectapension, Assureweb and FE Analytics.
- Assisting advisers and paraplanners with ad hoc requirements. These could range from non-advice related reports to assisting with annual review reports and other activities.
- Ensure in-house systems are effectively used to record case progression and work for costs and audit trail purposes.
- Awareness of industry changes, including with regards to suitability report requirements and maintaining CPD & FCA knowledge, in line with company and CII requirements.
- Ad hoc / miscellaneous tasks.

The Knowledge, Experience And Qualifications You Need

- Previous paraplanning experience essential.
- Level 4 - Diploma Qualified (CII) or close to this.
- Excellent knowledge of retail investment, savings, pension and protection products.
- Excellent knowledge of suitability report content, format and requirements.
- Significant experience composing suitability letters.
- Ability to communicate with others confidently whilst remaining flexible/adaptable.
- Highly developed analytical, observational, written and verbal communication skills.
- Exemplary attention to detail.
- Strong organisational skills.
- Proficiency with using various software packages, such as Microsoft Excel and Word.

The Knowledge, Experience And Qualifications That Will Help

- Relevant experience with external software/tools, such as FE Analytics, Selectapension, Defaqto Engage, Assureweb, Cash Calc or similar.
- Experience with DB or safeguarded benefit pension reviews.

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.

Important Information: Issued by Benchmark Capital Limited, Broadlands Business Campus, Langhurstwood Road, Horsham, West Sussex, RH12 4QP. Registration in England No 09404621.