

## **JOB TITLE – Technical Specialist**

### **Job Description**

Position: Paraplanner  
Hours: Flexible. Full or part time.  
Days: Monday to Friday (unless reduced hours/days agreed accordingly)  
Location: Newbury, Berks

### **Purpose of the role**

As a member of the One Financial Adviser Ltd team reporting to the Financial Planning Manager, the job-holder will be responsible for delivering affordable immediate retirement advice to customers. The role is desk-based with no travel to customers required.

### **Responsibilities**

- Checking and signing off financial advice for customers reaching retirement age (CF30 authorisation will be required immediately with competent adviser status will be required within 3 months - support will be given to achieve this). NB no pension transfer, opt-out or conversion of safeguarded benefits involved.
- Assisting customers with day to day queries and resolving any issues with their suitability reports or related administration.
- Contributing to ideas and ongoing improvement of the service.
- Support with operations and compliance as and when required.

The job-holder will be responsible for contributing to the successful delivery of the One Financial Adviser's team ongoing objectives. This will involve:

- Helping to deliver honest, affordable and customer-focussed retirement advice.
- Adhering to compliance and operations policies and procedures at all times.

### **Skills and Experience**

#### **Experience**

- Certified Financial Planner/DipPFS as a minimum with CPD maintained from passing DipPFS to date
- 5+ years technical, paraplanning or advisory experience
- Confident with all types of pension schemes and products and pension benefits
- Happy working independently and comfortable being part of a small team
- Chartered status or an intention to work towards this is desirable

## **Technical and other skills required**

- Ability to learn quickly and a continual willingness to expand knowledge
- A proactive, entrepreneurial, self-starter attitude
- Ability to write in a clear and concise manner for a non-technical audience
- Ability to assimilate new information and understand commercial and technical implications
- Good Microsoft Office skills, especially Excel, Word, Outlook. Powerpoint & Visio desirable.

## **Essential Competencies:**

### **Teamwork**

- Offers assistance to colleagues; is widely regarded and respected as someone to go to for help in their area of expertise
- Collaborates and interacts without regard to title, level or position
- Fosters friendly and cooperative relationships

### **Professionalism & integrity**

- Makes a positive impression; represents the company well at all times
- Evaluates lessons learned from both successes and failures
- Demonstrates willingness to make commitments based on all information known at the time and delivers upon those commitments
- Adheres to all corporate policies, makes prudent use of company resources and acts with complete integrity in all matters
- Adheres to the ethical code of the Chartered Insurance Institute or similar professional body (such as CISI).
- Keeps pace with industry change and regulatory developments

### **Communication**

- Good interpersonal and communication skills (written and verbal)
- Confident communicating with customers via email, Skype/Webex, and telephone

### **Business acumen**

- Understands internal and external customer requirements



Powering financial insight

### **Decision Making**

- Numerate with analytical skills

### **Problem Solving**

- Enjoys problem-solving and working towards continuous improvement.