

## **Technical Specialist - FinTech IT Software Company**

### **About Us!**

EValue is a young, fast paced, growing FinTech company and the leading UK provider of financial planning and advice technology.

Working with over 80% of large financial institutions in the UK, EValue's white labelled solutions were used by approximately 200,000 consumers and financial advisers in 2019.

We have 80 talented integrated specialists, working across offices in Newbury and London.

### **The benefits of joining our exciting team**

As well as offering fantastic opportunities for career progression once established in your role, you will be joining a friendly and relaxed working environment where you will be continuously supported and encouraged to reach your full potential. We have an open culture where you are encouraged to find and fix problems and not to pass them on to some other team. We're a great environment for makers and builders.

Sound like you?

We have fantastic benefits, including

- 25 days annual leave, bank holidays, one extra 'company day' for Christmas plus the option to buy a further five days annual leave
- Generous company pension scheme – up to 10% employer contribution
- Discretionary Bonus
- Private medical
- Long term disability and Life Insurance
- Study support policy
- Free parking
- A huge range of free hot and cold drinks
- Excellent fully funded company events
- Monthly osteopath sessions
- Monthly car valeting
- Company football team and Table Tennis team
- Quarterly Poker nights with pizza!
- The opportunity to support local charities through fundraising events organised throughout the year

## The Job

As a member of the One Financial Adviser Ltd team, 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.

## What you'll be doing

- 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 is 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.

## Required Knowledge and 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
- 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:**

- 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