Target Financial Management

Job Description

Job vacancy:	Paraplanner
Reporting to:	Support Team Leader
Base:	Bath
Annual salary:	Dependent on experience
Package:	23 days annual leave
	4 x salary life assurance
	Group Income Protection Scheme
	Group Personal Pension Scheme

Job Purpose:

- To provide full pre and post sales support to consultants in order to provide a comprehensive service to clients and ensure that Company targets are achieved with client satisfaction confirmed and exceeded.

Key Responsibilities:

- Prepare and produce clear and concise recommendation reports using information supplied by Consultant that follows guidelines laid down by the Company.

- Support the consultant in research to identify suitable products to meet clients needs using all available resources (Synaptic, Exchange, Money Marketing, existing client information, Broker meetings etc).

- Gather written information on existing client products and summarise using Company summary templates to support recommendations to clients.

- Assist with portfolio construction in order to establish client options.

- Where required, attend client meetings with Consultant to gather and record ‘knowing your client information’ on appropriate forms and summarising action points.

- Update Intelliflo and paper files daily to ensure accurate and up to date business written and client records are maintained, to standards laid down by the Company.

- Respond proactively to client queries and requests and meet their needs in line with departmental service standards.

- Check all letters and documents are for accuracy prior to issue to ensure excellent client service.

- Provide consultants with all documentation required for client meetings to the Company standards.

- Manage consultant’s diary, book/cancel appointments and meetings as required and send appointment letters. Organise travel and accommodation arrangements where required.

- Manage the workload of an administrator, to ensure client recommendations are processed, action is taken to chase information and decisions from product providers for new and existing clients. To ensure all actions are diarised as necessary to ensure that client recommendations and proposals move forward successfully to completion, and that documentation has been produced accurately and commissions paid.

- Ensure that consultants are following the Company’s compliance procedures and advise the Administration Manager immediately if not the case.

Key Relationships:

- TFM team
- Clients
- Insurance companies

Decision Making:

- Make client recommendations for approval by Consultant
- Organisation of workloads

Problem Solving:

- Identify alternative client options
- Identify sources of information to resolve product and client queries
- Prioritising workloads
- Dealing with client queries
- Identifying improvements in administrative methods
- Sourcing appropriate information to support client needs

Education and Training

- Achievement of full FPC / Certificate in Financial Planning
- Achievement of or working towards Diploma in Financial Planning
- Ongoing technical learning through reading trade publications, workshops and specialist reading, courses etc.
- Ongoing compliance learning to ensure activities are in line with TFM's compliance manual procedures.

Experience:

- Minimum one year experience in a paraplanner role within IFA environment and 2-3 years experience in a financial services support role.

Skills, Knowledge and Competencies:

Interpersonal

- Client Focus
- Attention to quality and accuracy
- Initiative
- Results oriented
- Team working
- Technical (industry, compliance)
- Flexible
- Managing self
- Commercial awareness

Technical

- Product knowledge – Pensions (Individual & Corporate inc transfers), Protection (Individual & Corporate), Investments (On & Offshore)
- IT – MS Office, Internet, Synaptics, Exchange, Intelliflo

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Measurement Data:

- Accuracy of client records and databases
- Suggestions for improvements to systems and procedures.
- Consultants' feedback
- Clients' feedback
- Examination results
- Aged debt
- KPIs