



HADLOW EDWARDS
Paraplanning Solutions Ltd.

Trainee Paraplanner

Employer: Hadlow Edwards Paraplanning Solutions Ltd

Industry: Financial Services

Location: Wrexham

Hours: 5 days per week - 9am until 5pm - Monday - Friday

Salary: £25,000 starting salary

Contract type: Permanent

Benefits;

1. 30 days holiday (inclusive of bank holidays, increasing with length of service, Christmas company Shutdown is also in addition)
2. NHS Top up Medical Cash Plan (increasing with length of service)
3. Gym membership
4. Free onsite parking
5. Bike to work scheme
6. Exam support and funding
7. Inhouse development path for those that want to develop throughout the various roles
8. Team socials
9. Flexible working (ability to work from home)

Role Purpose: As a Trainee Paraplanner you will be required to provide full time administrative support to the Paraplanning team and clients (other SJP Practices). Developing over a range of Investment and Pension areas, increasing with knowledge and complexity as one develops

Key Duties and Responsibilities:

- Liaising with clients (SJP Practices) and external/third party providers both by phone and letter
- Gathering of information from third parties/external providers
- Action Client Letter of Authorities
- Scanning client information
- Chasing external providers for outstanding information and ensuring this is met in a timely manner
- Preparation of basic suitability letters and reports, developing skills and knowledge in time to take on more complex cases
- Calculations and research to support suitability letter writing
- Taking full responsibility for the client files and back-office IT records throughout the advice process - Inclusive of internal CRM system and Salesforce

- Case Management of own workload – ensuring timescales are adhered to keeping all cases within timeframes and updates are provided to Manager and clients (SJP practices)
- Project a professional image in both appearance and attitude and provide quality support on time to agreed standards
- Maintain up to date industry knowledge and awareness by attending training days
- Maintain technical competence at an appropriate level to meet the requirements of the role
- Maintain a good working relationship with colleagues, clients and third parties.

Person Specification:

- Previous experience in office support role, ideally in financial services or related sector
- Genuine interest in Financial Services
- High level of attention to detail
- Highly organised
- Excellent written and verbal communication skills
- IT Skills
- Manages time effectively with the ability to multi task
- Demonstrates a positive attitude at all times
- Works well as an individual and also as part of a large team
- Open to change with a creative approach to problem solving