



HADLOW EDWARDS
Paraplanning Solutions Ltd.

Paraplanner

Employer: Hadlow Edwards Paraplanning Solutions Ltd

Location: Wrexham

Hours: Full time. 9am until 5pm (Monday to Friday)

Salary; Competitive and open to discussion (dependent on Skills, experience, and Qualifications)

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. Hybrid/Flexible working

Role purpose: An exciting new opportunity has arisen within Hadlow Edwards Paraplanning Solutions Ltd, who are a highly successful outsourcing Paraplanning company, who provide support for SJP Practices all over the UK. The purpose of the role is to complete paraplanning support for SJP Partners and Practices, across a varied range of Investments and products.

Key Duties/Responsibilities/Person Specification:

- Providing high quality support to the SJP Partners and practices
- Preparation of suitability letter and reports across a varied product range
- Analysing clients circumstances, goals and objectives to ensure they match the desired outcome
- Accurately recording clients data into company systems
- High standard of communication on case updates between the company and the SJP Partner/Business
- Working within desired company timescales for completion of suitability reports
- Liaising with clients (SJP Practices) and external/third party providers both by phone and letter
- Calculations and research to support suitability letter writing
- 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)
- Analysis of third party ceding information
- Maintain up to date industry knowledge and awareness by attending training days and sessions
- Maintain technical competence at an appropriate level to meet the role's requirements.
- Previous experience in a Paraplanning role is required
- Completion of Level 4 Diploma in Financial regulated planning is advantageous
- High level of attention to detail and accuracy
- Excellent written and verbal communication skills
- Always demonstrates a positive attitude
- Works well as an individual and as part of a large team

For further information or to submit your application, please email katy.davies2@sjpp.co.uk