



BERRY & OAK

CHARTERED FINANCIAL PLANNERS

Job Title: Paraplanner

Salary: £24,000 to £35,000 per annum plus excellent benefits

Job type: Full Time, Permanent

Location: The beautiful village of Boston Spa, West Yorkshire (LS23), with ample free parking

Why come and work with Berry & Oak?

We are a **multi award-winning** financial planning firm, holding the prestigious titles of **Chartered** Financial Planning Firm and also an **Accredited** Financial Planning Firm.

We are a small but **highly qualified team** providing full financial planning that is **independent** and an excellent level of service to our high net worth clients. We have a clear focus on doing the right thing for our clients, in the right way. This has led to receiving a number of awards and accolades such as the “**CISI Accredited Financial Planning Firm of the Year 2019**”, the “**Professional Adviser Firm of the Year 2020**” and also the “**Yorkshire Financial Awards Employer of the Year 2019**”.

We have also been awarded the “**New Model Adviser firm of the North**” for 2019 and 2020 as well as the “**Professional Adviser Firm of the year-North-East**” for 2019 and 2020.

The awards and accolades we have achieved are a testament to the quality of the work and service provided by our team to our clients and shows we are committed to being the best financial planning firm that we can be.

As a steadily growing financial planning business, we offer a superb working environment and ultimately a great opportunity for a Paraplanner looking for the next move. We will provide you with support and direction to help you develop your skills, with the ability to progress as the business grows and you will have ample opportunity to contribute to the development of the business.

Key Purpose of the Role

Responsibility for providing excellent paraplanning support to the Financial Planners.

One of the unique parts of our role is that you will be actively encouraged to participate in client meetings and help to formulate financial plans and strategies and will not just be a report writer.....

Experience of process and workflow management would be beneficial.

Duties & responsibilities include:

- Support the Financial Planners with research and analysis to meet client needs and objectives
- Prepare Financial Plans and Suitability Reports
- Prepare and collate documentation to support the recommendation and justify the provider and product recommended.
- Assist with client meetings, including taking notes and follow up any actions as required.
- Manage your own workflows and tasks.
- Follow compliance processes to manage risk and adhere to quality standards whilst ensuring excellent customer outcomes.



Berry & Oak, Boston House, 214 High Street, Boston Spa, West Yorkshire, LS23 6AD.
T: 01937 223055 | E: info@berryandoak.com | W: berryandoak.com

Berry & Oak is a trading name of Berry & Oak Ltd, which is authorised and regulated by the Financial Conduct Authority, FRN 787328. Registered Office: Boston House, 214 High Street, Boston Spa, West Yorkshire LS23 6AD. Berry & Oak Ltd is registered in England under Number 09940516.



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Benefits

We believe it's important to support our team, which is why we provide an excellent benefits package.

- Competitive Annual Salary (Experience Dependant)
- Potential Bonus up to 15% of Salary
- 33 Days holiday, Including Bank Holidays
- Group Pension with 5% employer contribution, alongside a 5% employee contribution and salary sacrifice is available.
- Life Insurance, Private Medial Insurance, Private Health care Scheme
- Ongoing support of time and financial assistance for training and qualifications.
- Some flexibility of working arrangements are available.
- Free Car Parking

Skills and Experience

- You will hold the Diploma Level 4 qualification (or higher) and have a desire to achieve Chartered and / or Certified financial planner status.
- You will have a minimum of 18 months experience in a similar position.
- Good understanding of the financial planning process and associated compliance aspects.
- Driven and focused with the ability to complete tasks under pressure on time and right first time.
- Experience of report writing and conducting investment and product market research.
- Technically proficient across all areas of financial planning, especially pensions.
- Used to dealing with high net worth clients
- Act with honesty and integrity
- Ability to use technical financial planning tools, financial modelling and back office software.
- Be able to work on own initiative & achieve agreed outcomes without supervision.
- The ability to work as part of a team and interact with clients and providers outside of the business.
- Act as main point of contact and deal effectively with technical queries from clients and other parties through effective communication.

Key Dates

- Closing Date for applications – 4th September 2020
- Telephone / Zoom Interviews – 8th & 9th September 2020
- Final Interviews 15th and 17th September 2020

How to Apply

If you have the experience and the desire to make a difference in this expanding company, please register your interest in confidence. Please note the planned interview dates.

Please send your CV and a short covering letter to sarah.elson@berryandoak.com explaining why the opportunity interests you and why you would be a valuable addition to our team.

We look forward to hearing from you.



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