BloomsburyWealth

JOB TITLE: Wealth Planning Assistant

LOCATION: London and at home

REPORTS TO: Wealth Planning Manager & Branch Principals

If you want to join the planning team at Bloomsbury and become part of the company's future success and growth, please read the details below and send your CV with a covering letter telling us more about you to truewealth@bloomsburywealth.co.uk

PURPOSE OF THE JOB

- To support the Branch Principals, Wealth Planning Managers (WPMs) and Wealth Planning Executives (WPEs) in delivering high quality, personalised and professional financial planning and investment service to a select group of private clients.
- Ideal first role in financial planning or suitable for someone with some financial services experience.

PRINCIPAL ACCOUNTABILITIES AND FUNCTIONS

- Delivery of consistent and exceptional client service.
- Gathering of hard data on clients and potential clients through various means including email; telephone and post, with the client, their other professional advisers and product/service providers.
- Record updated data in Salesforce (customer relationship management system).
- Assist with checking and collating of client, WPM and WPE documents for meetings.
- Prepare documents and obtain up to date valuations in advance of client meetings.
- Prepare non-implementation paperwork for clients.
- Assist the planning team with collating documentation relating to: client engagement; account opening; pension switches; re-registration of assets to our custody etc..
- Create and update Wealth Snapshots (summaries of each client's data).
- Assist in producing draft financial plans using financial planning software to be used as the basis of discussion with clients.
- Carry out client-specific product research using software, e.g. for life insurance and annuities.
- Conduct client-specific product and service tendering, e.g. for offshore investment bonds.
- Peer review letters and reports prepared by other members of the team.
- In conjunction with the WPMs and WPEs, ensure that all deadlines for client work are met.
- Schedule, write and distribute agendas and minutes for internal Financial Planning Update and Investment Research Committee meetings (three to four times a year each).

KNOWLEDGE, SKILL AND EXPERIENCE REQUIRED

- Meticulous attention to detail and ability to deliver on promises.
- Organisational and communication skills.
- Excellent written English.
- Knowledge of various software packages, including Excel.
- A good general knowledge of the financial planning and investment market and the ability to keep up to date with contemporary issues.
- To use that knowledge to help in the delivery of appropriate solutions to clients.
- 'A roll your sleeves up and can do 'attitude'.
- A genuine enthusiasm for the financial planning profession.
- To be thinking constantly about how we can deliver our service more effectively, and be prepared to ask 'Why do we do it like this?'.

OTHER

- Hybrid role working from home but also able to commute reliably to City-based office for up to three days a week.
- Starting salary £30,000pa with benefits and bonus.
- Closing date for applications is the 30th April 2023. All successful applicants will be notified in early May.