

WE
ARE
HIRING!

INDEPENDENT FINANCIAL PLANNER (TRAINEE)

A fantastic opportunity has arisen to join our Central Advice Department (CAD) as a Trainee Independent Financial Planner.

This role is an employed role based within our expanding Central Advice Department at Sandringham Financial Partners. We are one of the market leading independent national advice firms offering a fresh and innovative approach to financial advice.

Your role is to work with clients of IFAs who retire through our Partner Retirement Program. You will be dealing with a wide range of clients, nationwide and work extensively in the wealth arena inclusive of Pensions, Investments, Mortgage and Protection, Later Life Products and Estate Planning.

You will spend the first 6 – 12 months shadowing an existing CAD Financial Planner to learn all aspects of the role, as well as the 'Sandringham Way'. This will include paraplanning, client contact, shadowing meetings and completing any final examinations deemed necessary for the role.

Once this has been completed, then you would become a (trainee) Independent Financial Planner within CAD and you will move into the next phase which will include a development plan, observed meetings and the relevant compliance checks until sign off is reached.

ABOUT US

Sandringham Financial Partners is a UK market-leader in the provision of tailored independent financial advice. Everything we do is designed to deliver the best outcomes for our personal and corporate clients.

The Central Advice Department is a new and upcoming team within Sandringham. The main role of the department is to provide a continued service to the clients of Advising Partners who have chosen to retire; however, you will also get clients from other sources such as the 'contact us' page on the website and your 'VouchedFor' profile.

The role is full time and will be a mixture of home and office working.

During your initial training, 'on site' training will be required and delivered at the Head Office of Sandringham Financial Partners in Huddersfield town centre.

CAD team meetings are usually monthly and take place in Leeds City Centre.

WHAT WILL THE ROLE INVOLVE?

- Learn all aspects of Sandringham's financial planning process and advice proposition.
- Assist the current CAD advisers with sourcing solutions using our Centralised Investment Proposition and support from the in-house Paraplanning team.
- Develop and maintain a professional approach to contacting clients.
- Delivering a first class, client focused advice service by assisting with identifying areas for financial planning.
- Sourcing solutions for the areas identified that are suitable for the client's needs and objectives.
- Delivering a succinct annual review with clients who pay for the ongoing service, highlighting and delivering solutions for any shortfalls identified.
- Onboard new clients into the business and manage expectations of new and existing clients.
- Communicating with clients digitally and only where required, face to face.
- Design and deliver new content for the department.
- As a planner, provide training to and give feedback on cases delivered to you via the Paraplanning department.
- Identifying and reporting of any trends or process improvements.
- Keep up to date knowledge of regulations, practices, and financial products.

BENEFITS OF JOINING SANDRINGHAM:

- Free parking provided at HO.
- Exam support to chartered status with access to an internal 'academy'.
- Career development opportunities within all areas of the business.
- Auto Enrolment pension with employer contributions.
- Income Protection.
- Critical Illness (3x) and Death in Service (4x) Benefits.
- Employee Assistance Program (along with many more perks) via Perkbox.
- Access to Mental Health First Aiders.
- 30 days holiday per year (excluding bank holidays).
- Flexible working available.
- Job Type: Full Time, Permanent.

REQUIRED SKILLS, EDUCATION & EXPERIENCE:

- Level 4 Diploma in Financial Planning (essential).
- Qualified with Practical Investment Planning (or willing to sign up upon joining).
- Mortgage Qualified (or willing to complete within 6 months of joining).
- Qualified in Lifetime Mortgage and Long-Term Care (or willing to complete within 12 months of joining).
- Willing to study towards Chartered (CFP) level (financial support available) once Independent Financial Planner sign off has been attained.
- Similar experience of working within an office environment and within financial services (desirable but not essential).
- Knowledge of what good and bad advice looks like.
- Strong IT skills with the ability to adapt to new technology as this becomes available through the Sandringham proposition.
- The ability to be flexible in responding to the needs of the business and managing your time/diary effectively.
- Confident in using your own initiative as well as working from the instruction of others.
- Comfortable building relationships with staff and clients using all mediums i.e., video call/emails/telephone and face to face.