

## Vacancy: Senior Paraplanner

*"The best people always want to work for the best firms –  
so are you ready to make your move?"*

Let's get to the basics – we offer a very competitive package for the right candidate, which includes a competitive starting salary depending on experience.

- 25 days paid holiday, plus bank holidays and extra days awarded with service.
- Flexible working including the opportunity to work from home from time to time
- A Pension and death-in-service plan
- A performance based annual bonus

Working in a business that:

- Provides administrative support so you can focus on your job
- Provides paid study leave and financial support for career-related personal development

Reporting to the Technical Manager you will be based in our superb office in Walmley, Sutton Coldfield, in a tranquil environment within a Grade Two \* Listed Cruck Barn.

*"Since I started Henwood Court it has been my mission to build a financial planning business that adds significant value often beyond financial to clients and rewards employees with career progression, development and fulfilment"*

**Nick Platt, MD**

Henwood Court are looking to hire a talented, highly qualified and successful senior paraplanner on a permanent full-time basis, who will help with our next phase of development and growth.

This is the opportunity for you if you resonate with our core beliefs:

- Have a natural inclination to help people, having a highly ethical inner self and morals to do your best for clients and the team
- A determination to do and be the best at what you do
- To be an expert, be at the top of your game while continuing to learn and develop
- You have a desire to make a difference and not just collect a salary?

**Your senior paraplanning mission spec:** To provide technical support, research and report writing for our clients that have a range of financial planning needs, freeing the financial planners to focus on client service and relationships.



## **YOUR ATTRIBUTES**

- The ability to work to tight deadlines without impacting on quality
- To thrive under pressure, without boiling over
- Ready to work unsupervised taking ownership and responsibility for work but always a team player
- A great self-starter; no need for jump-leads
- A positive can-do attitude
- Always professional

## **YOUR SKILLS**

- The ability to eat work, cope with the demands of a busy office, spinning many plates and work within agreed timescales
- Highly organised
- Technically brilliant in all core areas of financial planning, in particular pensions, investments, tax and estate planning.
- Not slow in speaking up
- Can communicate clearly and make your point – orally and written
- An eye for detail
- Technology is no barrier – (Word, Excel, O&M, Cashflow Planning software) are all walks in the park
- Excellent spoken and written English

## **ESSENTIAL COMPETENCIES**

- A minimum of seven years' experience within a financial planning business
- Level Four Diploma qualified with a study plan to reach Chartered status
- Experience working within an existing Financial Planning firm supporting financial planners with their workload
- The ability to write technically accurate suitability reports within agreed timescales
- The ability to undertake independent research sourcing solutions to client issues and provide guidance and support where appropriate to the financial planning team

## **DESIRABLE COMPETENCIES**

- Hold Chartered Financial Planner and Certified Financial Planner qualifications
- The ability and desire to write technical articles on topical financial matters
- The ability to provide internal technical training on financial matters
- Certificate in Paraplanning
- Experience of working within a 'true' financial planning business
- A comprehensive knowledge of Truth Cashflow software



## **ABOUT HENWOOD COURT**

Henwood Court is well known in the financial planning community, and has a reputation for being a leading edge firm at the forefront of financial planning – our Corporate Chartered status is testament to our commitment to excellence, but we don't intend to rest on our laurels.

We have detailed plans to grow the firm, innovate and be amongst the real winners in the new financial services landscape. We will do that by hiring the very best talent available, ensuring that our clients' interests are always placed at the heart of all we do – and by daring to challenge the status quo and do things differently.

Our workforce is very stable and so opportunities to join us are rare – however we now have an opening and are seeking an outstanding individual to join our team.

We will hire based as much on culture, values and attitude – as on qualifications and experience. You will need to be bright and with good attention to detail, personable and a real team player.

Evidence of self-development and personal interests will be good indicators for us when compiling a short list.

We have a work hard/play hard approach and are deadly serious about making a difference to the lives of our clients. And enjoying the ride along the way.

**To apply, please email [nick@henwoodcourt.co.uk](mailto:nick@henwoodcourt.co.uk) with your CV and a covering message about why you want to join us and how you will rock our world.**



