



Henwood Court are Hiring!

Job Title: Technical Assistant (Paraplanner)

Location: Sutton Coldfield

The Job:

Due to ambitious growth plans, we are looking for an experienced Paraplanner to join our growing multi-disciplinary team to ensure that we continue to deliver an industry leading service that continually exceeds client expectations.

The successful candidate will join an established Technical (paraplanning) Team: the “brains” of the Company. Your role will involve researching solutions to a wide range of complex financial planning issues to enable our clients to live the life they want.

On a day to day basis, you will support the Firm’s Financial Planners with client queries, calculations, preparation of suitability reports and technical research.

As part of the wider team, you will collaborate with and support your colleagues to ensure that we provide the very best solutions and service to our clients.

About You:

You will be an **individual**, capable of independently researching and writing complex, bespoke technical reports to a high standard due to your experience, excellent technical knowledge and high standard of English and grammar.

You will be comfortable using your excellent Maths and Excel skills to carry out complex calculations.

You will be qualified to at least Level 4 Diploma level and will be committed to continuing your own personal development through further study. You will have experience across a wide range of financial planning areas including pensions (Defined Benefit desirable), investment solutions, tax planning, Trust and IHT planning. You will also have experience in cashflow planning.

You will have a **voice** and be happy to use it in a constructive and respectful way.

Whilst you will be an individual, you will also enjoy working as a **team**!

Working at Henwood Court isn’t just about Financial Planning - it’s about people: our clients and our colleagues.

As a member of the Henwood Court team, you will be as committed to client service as you are to providing first class technical advice, going above and beyond to provide the very best for our clients.

You will also support and encourage team members, offering your technical knowledge to develop their own understanding and knowledge.



About Us:

Henwood Court Financial Planning is an independently owned, multi award winning firm of lifestyle financial planners. Our offices are found in the beautiful and unique surroundings of The Cruck Barn in the New Hall Country Park Estate in Sutton Coldfield.

The interior of our barn was renovated in 2020 providing a modern, open plan office environment within the historic Cruck Barn. We think this epitomises Henwood Court: the tradition and strength of good old fashioned client service, coupled with forward-thinking financial planning.

At Henwood Court, we work with “normal people done well”. These will generally be clients with AUM in excess of £1m; the Firm has particular expertise in working with successful, established business owners, executives or retirees.

Our Core Values are carried through to every part of what we do, and the successful candidate will embrace these values with enthusiasm:

- **Hunger for knowledge**
- **Care for clients and colleagues**
- **Fanatical attention to consistency and detail**
- **Passionate to be the best**

As an independent, growing business, we recognise that, in the same way that each of our clients have different objectives and needs, so do the members of our team. Therefore, in joining the Henwood Court family, the successful candidate will have a Personal Development Plan put in place ensuring that their own desires for their career development are aligned with the company's and a plan put in place to support the achievement of these goals.

We also aim to provide an open and supportive office environment firmly believing that there is no such thing as a silly question and that collaboration and communication is the key to the development of all.

Within all of this, we acknowledge that work is not the be all and end all! We spend much of our time telling our clients to enjoy their lives and must therefore practise this sentiment within our team. We therefore support a level of flexible working and offer a generous holiday entitlement and benefits package. We also believe in creating a work environment that is enjoyable and fun to be in.

Above all we care, for our clients and our team.

If you care passionately about people and have the qualities that we need, we want to hear from you – the kettle will be on!