Henwood
COURT

ASSOCIATE FINANCIAL PLANNER

Department: Financial Planning

Reporting to: Senior Associate Financial Planner

Location: Office Based with some potential for travel

Package: Competitive salary + performance incentives + benefits

ROLE SUMMARY

Are you a detail-driven financial professional with a passion for delivering exceptional client experiences and helping people live the life they want to live?

As our Associate Financial Planner, you will play a vital role in supporting a Financial Planner within a dedicated pod structure—helping to deliver outstanding advice, service, and value to our clients. You'll work collaboratively across the team to ensure every client interaction reflects our commitment to confidence, peace of mind, and living life to the fullest.

Your primary responsibilities will include:

- Attend client meetings (depending on service level) and document discussions accurately.
- Conduct detailed technical research and analysis to support financial recommendations.
- Produce high-quality suitability reports aligned with clients' needs, goals, and values.
- Work closely with fellow Associate Financial Planners to ensure all work is completed within agreed timescales.

You'll work within a pod structure alongside Financial Planners and Client Service Associates, supported by a collaborative leadership team that values precision, learning, and client care.

Together, we'll deliver on our value guarantee—to provide great advice, outstanding service, care, and attention that delivers far more value than typical advisory or wealth management fees can offer.

WHAT YOU'LL DO

Client Support & Relationship Management

- Partner with a Financial Planner to deliver exceptional client experiences throughout the planning journey.
- Attend and support client meetings, capture key insights, and ensure timely, high-quality follow-up.
- Act as a friendly, professional point of contact—providing updates, reassurance, and personal touches that create a "wow" experience.

Technical Research & Reporting

- Analyse clients' financial arrangements to identify opportunities and produce well-evidenced, compliant recommendations.
- Prepare clear, accurate research and suitability reports aligned with client goals and our investment philosophy.
- Maintain up-to-date knowledge of products, providers, and financial planning strategies.

Collaboration & Pod Excellence

- Work collaboratively within your pod to ensure seamless service and balanced workloads.
- Support colleagues, share technical knowledge, and contribute to continuous process improvements.

Professional Growth

- Take ownership of your professional development through study and CPD.
- Embrace feedback, mentoring, and opportunities to progress toward Chartered or Financial Planner status.
- Demonstrate our values of excellence, integrity, and care in all you do.

WHO YOU ARE

- A natural connector – You thrive in social settings, listen deeply, and communicate with impact.
- A strategic thinker – You understand clients' big-picture goals and how financial planning supports them.
- An entrepreneurial planner – You're motivated by results, focused on growth, and keen to build something meaningful.
- A professional face of the firm – You embody confidence, credibility, and a warm presence that clients trust.

EXPERIENCE & QUALIFICATIONS

- Ideally a Chartered Financial Planner, or working towards (Minimum of Level 4)
- Minimum of 3 years of experience working in a technical/paraplanning role
- Strong understanding of financial planning principles, tax-efficient strategies, and investment solutions.
- Skilled in producing clear, compliant research and suitability reports.
- Confident communicator—able to translate complex information into simple, client-friendly language.
- Strong awareness of compliance, regulation, and best-practice standards.
- Proactive team player who values collaboration, precision, and continuous learning.

WHY JOIN HENWOOD COURT?

- We're not just another financial planning firm—we're building a movement that empowers people to live their best lives through clarity, confidence, and smart financial decisions.

As a key member of our team, you'll benefit from:

- A values-driven, forward-thinking culture.
- A collaborative environment with a clear division between acquisition and servicing.
- Support from marketing, paraplanning, and operations so you can focus on what you do best—winning trust and driving growth.
- Continuous development opportunities, mentorship from the MD, and personalised progression planning.

Read the Henwood Court Way Here:

NEXT STEPS

If you're ready to build your expertise, deliver exceptional client outcomes, and play a key role in a collaborative, high-performing team, we'd love to hear from you. Join us and help create life-changing financial confidence for our clients.

Apply here:	peter.robbins@henwoodcourt.co.uk nick@henwoodcourt.co.uk

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