Henwood COURT

PRIVATE CLIENT PLANNER

Client Relationship Specialist

Department: Financial Planning

Reporting to: Managing Director

Location: Hybrid

Package: Competitive salary + performance incentives + benefits

ROLE SUMMARY

Are you an experienced Chartered Financial Planner who thrives on deep relationships, technical excellence, and delivering outstanding ongoing advice?

As our dedicated Private Client Planner, you will play a pivotal role in nurturing and expanding long term client relationships within your Pod. A Pod is what we call your team within the business. It is a close knit group of planners and support colleagues that you work closely with to deliver exceptional client outcomes and shared accountability for performance.

You are the trusted adviser. The number on the fridge.

With high technical expertise and emotional intelligence, you will take a strategic position on your clients' financial lives. You will design, implement, and evolve sophisticated financial planning solutions that empower clients and their families to achieve clarity, confidence, and freedom.

Working within the Pod structure, you will lead ongoing client strategy while supporting the onboarding planner in growing your Pod to capacity, ensuring both exceptional service and sustainable growth.

WHAT YOU'LL DO

Trusted Client Relationships

Build and maintain long term client relationships through proactive service, consistent communication and clear accountability, combining technical precision with genuine understanding while identifying opportunities and generating referrals through the strength of those relationships.

Lifestyle and Strategic Financial Planning

Deliver holistic, lifestyle focused financial planning through strategic oversight, complex cashflow modelling and clear articulation of the firm's investment philosophy. Provide technical expertise across retirement, tax planning, estate planning, protection, investments, behavioural risk profiling and planning structures including trusts and companies.

Pod Leadership and Accountability

Lead and develop your Pod by setting strategic direction, maintaining service standards, prioritising workloads, driving accountability to agreed measures, and mentoring team members to support performance and progression.

Technical Excellence

Deliver robust, compliant financial planning by analysing existing arrangements, identifying risks and opportunities, researching and evidencing appropriate solutions, producing high quality suitability reports, collaborating with technical colleagues and maintaining accurate records in line with regulatory standards.

WHO YOU ARE

- **Professional planner** – You see financial planning as a profession, not a product.
- **Trusted relationship builder** – You earn trust through empathy, clarity and consistency.
- **Strategic thinker** – You simplify complex financial landscapes into clear direction.
- **Technically strong** – You combine deep knowledge with confident implementation.
- **Leader** – You manage multiple priorities while maintaining high standards.
- **Values driven professional** – You embody care, integrity and positivity.
- **Proactive operator** – You take ownership and act decisively.

EXPERIENCE AND QUALIFICATIONS

- Chartered Financial Planner
- Significant experience in a servicing focused advisory role
- Strong technical capability across pensions, investments, tax and estate planning
- Advanced cashflow modelling experience using Truth, Voyant, CashCalc or similar
- Proven track record of long term client retention and referral generation
- Familiarity with CRM and back office systems
- Strong understanding of compliance and regulatory frameworks

WHY JOIN HENWOOD COURT?

We believe financial planning is a profession built on judgement, integrity and long term relationships. That starts with how we work together.

You will benefit from:

- A collaborative environment where expertise is respected and your voice carries weight
- Leadership that sets clear direction and supports high standards
- Strong operational and technical infrastructure so you can focus on delivering high quality advice
- A culture of innovation and continual professional development
- Clear progression pathways for those who want to grow
- A culture where people actively support and encourage each other to be at their best

We are intentionally different from large consolidators and acquisition led firms. Our clients are not numbers, and neither are our advisers. We care deeply about delivering the right advice, and we value the standards, judgement and long term relationships that make that possible.

Read the Henwood Court Way Here:

NEXT STEPS

If this sounds like the environment where you would do your best work, let's talk.

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