

Vacancy: Financial Planner

*"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:

- Focuses on financial planning, not products
- Provides administrative and paraplanning support so you can focus on your job
- Provides paid study leave and financial support for career-related personal development
- Does things the way you want them to be done, giving you time to nurture your client relationships.

Reporting to the Managing Director 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 financial planner 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 financial planner mission spec: To provide financial planning advice, technical guidance and strategic support to existing and new clients.



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
- To genuinely care for your colleagues and clients and always do the right thing.

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 and compliant
- 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
- Highly computer literate – (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 build professional trusted relationships with clients and cope with their ongoing demands.
- The ability to understand technical matters to communicate to both clients and your 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
- 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 with your CV and a covering message about why you want to join us and how you will rock our world.

