

Vacancy: Financial Planning Assistant

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

Henwood Court are looking to hire a talented, highly competent and efficient Financial Planning Assistant 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 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 Planning Assistant mission spec: To support Financial Planner/s in their responsibilities; providing excellent client support, managing client relationships, administration and basic technical support, for an allocated number of clients that have a range of financial planning needs.

YOUR ATTRIBUTES

- Attention to detail
- Team-player
- Organised
- Conscientious
- Always professional

YOUR SKILLS & COMPETENCIES

- The ability to cope with the demands of a busy office
- Highly organised
- Ability to communicate clearly; both oral and written
- Numerate
- Computer literate – (minimum of Word, Excel)

DESIRABLE COMPETENCIES

- Experience working within an existing Financial Planning firm supporting financial planners with their workload
- Working towards your certificate in financial planning
- Knowledge of Truth Cashflow software



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.
- Pension and death-in-service
- Performance based annual bonus
- Paid study leave and financial support for career-related personal development

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

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 and awards are testament to our commitment to excellence.

We are a forward-thinking company, a growing business focused on helping individuals and their families to achieve their life ambitions. We aim to “wow” clients and we 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 are now expanding and have an opportunity for 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 are deadly serious about making a difference to the lives of our clients, and take an interest in them 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.

