

Job Description – Technical Assistant

Position Title	Technical Assistant
Department	Technical Team
Reporting to	Technical Director
Summary of Role	<p>To be part of the Technical (paraplanning) Team supporting the Firm's Financial Planners with day-to-day client queries, product research, calculations, preparation of suitability reports and technical research.</p> <p>To use technical knowledge and experience to support other team members.</p> <p>Work with all colleagues to deliver an industry leading service, continually exceeding client expectations using lifestyle financial planning to allow normal people done well to have the confidence and peace of mind to live the life they want to live</p> <p>Working as part of the Henwood Court Family to the HCFP Core Values: Hunger for knowledge Care for clients and colleagues Fanatical attention to consistency and detail Passionate to be the best</p>
Skills and Knowledge	<p>Qualifications and Experience</p> <p><i>Required:</i></p> <ul style="list-style-type: none"> • CII Level 4 Diploma in Financial Planning • Experience of working in financial services • Demonstrates a good understanding of the financial services industry. • An awareness of the compliance and regulatory framework <p><i>Desirable:</i></p> <ul style="list-style-type: none"> • Working towards Chartered status • Certified Financial Planner • Certificate in Paraplanning / Completion of Paraplanning (J09) Level 4 qualification

	<p>Competencies and Skills</p> <ul style="list-style-type: none"> • Proficient in the writing of complex, bespoke suitability reports with or without the use of templates • Ability to carry out complex financial calculations using Excel formula functions where required • Ability to analyse all types of arrangements / tax wrappers offering solutions to meet clients' needs • Ability to independently undertake research in line with clients' objectives documenting evidence of all research • Ability to question and challenge in a professional manner • Ability to work at pace without compromising on accuracy • Previous exposure to a broad range of complex financial planning issues including pensions (Defined Benefit desirable), investment solutions, tax planning, Trust and IHT planning • Experienced in the use of cashflow technologies <ul style="list-style-type: none"> • Develops strong working relationships with colleagues and clients • Able to communicate at all levels • Adopts a positive attitude • Willing to assist other team members with enthusiasm, respect, and empathy <ul style="list-style-type: none"> • Excellent organisation skills • Exceptional attention to detail • Demonstrates consistent performance excellence • Has the tenacity and temperament to work under pressure and within company timescales • Self-motivated and takes personal responsibility for completing tasks • Able to delegate and follow up tasks appropriately and effectively <ul style="list-style-type: none"> • Able to work efficiently using MS Office packages – Outlook, Word, and Excel • Familiarity with back-office systems, willingness to become an Expert in the systems used <ul style="list-style-type: none"> • Commitment to work within clearly defined operating procedures • Can use initiative appropriately without acting outside of role remit / crossing regulatory boundaries • Commitment to ongoing continual improvement, identifying any ways in which processes can be improved
<p>Duties and responsibilities</p> <p>To include, but not exclusively these duties. Other duties may be added as appropriate to the role, or management direction.</p>	<p>Technical</p> <ul style="list-style-type: none"> • Writing of complex, bespoke suitability reports • Writing of standard / templated suitability reports • Carrying out complex financial calculations • Analysis of clients' existing arrangements and tax wrappers identifying issues and opportunities particular to clients' needs • Research relevant products / solutions to meet clients' objectives documenting evidence of all research • Online trading within clients' portfolios • Ensure that all work carried out is technically accurate and completed within company timescales • Completion of company and personal measures • Writing of technical e-shots / papers on topical matters • Maintain personal technical knowledge and skills • To use technical knowledge and experience to encourage and support the development of colleagues
<p>Location</p>	<p>Walmley, Sutton Coldfield</p>