INDEPENDENT FINANCIAL ADVISER JOB DESCRIPTION

PHOENIX
MAKING YOUR FINANCES STRONGER

About us (https://phoenixwealthsolutions.com)

As financial advisers we provide individuals and businesses with practical and relevant solutions to help them to meet their financial objectives. We provide full financial planning across all areas of private client work including investments, pensions, mortgages and protection.

As we enter our 20th year of trading we have a well-established client bank which provides a steady stream of renewal income. We currently carry out around 500 client reviews per annum. Our total funds under management are £100m+. We usually receive one new client enquiry per week.

We currently have one IFA (business owner), one mortgage adviser, one paraplanner, one administrator and a Practice Manager. We are looking to bring new team members on board to allow us to continue to provide a first class service to our existing clients and bring in new clients.

About you

The advisers' role will be to maintain the client base you inherit, growing it through referrals and through the new business enquiries that come to the practice.

You should have a client focused approach, be a relationship builder and maintainer as opposed to a salesperson. You would be servicing, retaining and developing relationships through a genuine care for providing exceptional advice and gaining referrals to grow further in due course. Whilst not a requirement for this position, there would be a safe home for any transferrable business when restrictive covenants allow.

It is essential that you are level 4 qualified and ideally, you should be working to, or willing to work towards, chartered financial planner status.

The right individual would be an adviser with at least 3 years' experience having worked with medium-high net worth clients at a reputable IFA. Experience; knowledge and interest in building and reviewing a centralised investment proposition would also be advantageous. You must also be a team player and build good working relationships with other non-advising team members. You must follow company processes but also be willing to provide your input to our client service proposition and current working processes.

About the Role

You would be working closely with our existing IFA and Practice Manager to understand what we do for our clients and our existing processes. Clients would be identified to handover; a review meeting booked with both advisers and clients and then you would pick up from there, with the existing adviser on hand to provide support and guidance. You would be further supported by the Practice Manager, a paraplanner and administrator.

Any new client enquires would come direct to you.

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Our office is based in Johnstone town centre. This role allows the flexibility to work at home some days, dependant on client appointments. The hours of work would be Monday – Friday 9am – 5.30pm, however, you may have to work additional hours depending on client and business needs.

We offer an attractive pension package; membership of our DiS scheme and any CII exams would be funded by us.

The salary on offer is dependent on experience but will be in the region of £45,000 p.a basic. Quarterly bonusses are also payable, however, these are not guaranteed and are dependent on KPI scores. Bonusses are not linked solely to business written.

This is an excellent opportunity to join a practice where you can have input into the running of the business as well as looking after clients. This role could provide a long and successful career in financial advice for the right candidate, as well as the opportunity to have a shareholding of the business in the future.

Interested?

Contact Lynne Nicol, Practice Manager: 01505 325900 or email careers@phoenixwealthsolutions.com.