

# SENIOR PARAPLANNER

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**Job Title:** Senior Paraplanner

**Responsible to:** Head of Paraplanning

**Responsible for:** Providing services to the IFA team, supporting the continuing growth of the business.

**Based:** Stokenchurch, Bucks, HP14 3FE

We are looking for a Paraplanner to join the Paraplanning Team at Chiltern Consultancy.

The position will be suitable to someone who has a good working background in Paraplanning, and either Chartered, working towards Chartered, or at Diploma Level 4 Qualified with at least 5 years experience.

It is essential that candidates demonstrate a strong background within a similar environment as a Paraplanner as well as having an outgoing and aspirational personality.

## CANDIDATES WILL IDEALLY HAVE:

To be successful in this Paraplanning role, you will also need to be a good communicator and have a working knowledge of the financial services industry across the full range of investments, pensions, retirement solutions, trusts and both personal and business protection.

Your key responsibilities will be provision of high quality technical support and a good standard of literacy, written grammar and numeracy. Day to day duties will include fund and product research, writing bespoke and compliant suitability reports, preparing client portfolio review analysis, reviewing letters, overseeing the implementation of investments, cash flow modelling, attendance at client meetings and liaising with team Administrators to ensure general client administration is kept up to date.

You will be computer literate with the ability to use Microsoft Office including Excel and Word with a good knowledge of analytical tools and numerical aptitude. A good knowledge of IO would be beneficial.

## MAIN JOB TASKS AND RESPONSIBILITIES

- Receiving instructions during debriefings from advisers following client meetings.
- Interpreting data obtained by advisers during client meetings.
- Analysing data and using research tools to provide solutions to meet client needs and objectives.
- Providing records to support research undertaken.
- Consolidation of client needs and objectives, recommendations and course of action in a written format via a suitability letter, client specific illustration and key features document.
- Carrying out all tasks in a manner consistent with compliance procedures.
- Preparation of existing client files ready for reviews.
- Ensuring all client files are compliant on an ongoing basis
- All business related administrative duties

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## PERSONAL REQUIREMENTS

- A team player who enjoys a collaborative environment as well as ability to be self-motivated whilst remote working
- Highly industrious and pro-active approach with the ability to anticipate Adviser needs
- Adept at seamlessly pulling together all strands of a case from Administrative through to Compliance and Technical to work with the Adviser to serve the client's best interests
- Highly positive and personable individual who can stay calm under pressure
- Open and approachable demeanour with solid communication skills

## THIS ROLE OFFERS AN IMPRESSIVE BENEFITS PACKAGE WHICH INCLUDES:

- A Company pension scheme (currently with 5% Employer contribution),
- 4 x Death in Service Life Cover
- Employee Lifestyle Benefit scheme
- Salary sacrifice Electric Car Scheme
- A Health Cash Plan provided by Westfield Health. This is a P11d benefit.
- Entitled to join our group PMI scheme with Vitality at a discounted rate
- 26 days holiday per annum plus Bank Holidays
- Hybrid working (3 days in office, 2 days at home)

## YOUR FUTURE OUR FUTURE

When you join us at Chiltern, you become part of an ambitious team that's passionate about providing Independent impartial financial advice. Our team also know that we are here to support them every step of the way, providing opportunities for progression and enabling them to achieve their career aspirations by gaining professional training and qualifications.

**This is a fantastic opportunity for the right candidate to progress their career in a well-respected company that offers fantastic additional benefits. So, if you think you have the necessary experience for this Paraplanner role please apply now!**

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