

Private Client Desk Based Adviser

Location: Farnborough

Salary: Competitive salary, bonus and benefits

Job Brief

We are looking for a financial adviser to proactively service leads provided by Origen as part of various PLM projects that have been tendered for. The ideal candidate will be self motivated to ensure all revenue targets are met and work is completed in a compliant manner and meets the company's quality standards.

Main Responsibilities

- Provide financial advice and guidance across a variety of PLM areas; Pension Increase Exchange (PIE), Enhanced Transfer Values (ETV's) and Flexible Retirement Options (FRO)
- Assess client's overall financial picture, understand their needs and develop a solid financial plan
- Cultivate client base and build win-win relationships
- Keep abreast of industry's trends and research market to back up financial consulting
- Comply with FCA rules and guidance and our Training and Competence regulations
- Network and generate leads with , solicitors, and other professionals

Candidate Requirements

- Diploma qualified Financial adviser with proven work experience as a Financial adviser or other relevant experience i.e. Parraplanning
- Strong organisation and communication skills
- Accuracy, attention to detail and the ability to explain complex information clearly and simply is key
- Excellent PC skills and ability to operate database systems

Interview Process

1st Stage = Coffee Chat

2nd Stage = Competent Adviser Test

3rd Stage = Competency Based Interview and Role Play

How to Apply

Please click on the '**Apply Now**' button below, sending a covering letter, CV and any supporting documents.

APPLY NOW

Alternatively send a covering letter and a copy of your CV to **hr@origenfs.co.uk**