

Paraplanner

Location: Farnborough, Hampshire

(This role can be home based, but you would be required in the Farnbrough Office one day a week)

Salary: Competitive salary and benefits

Job Brief

We are looking for a non-client facing Paraplanner to join our centralised team at our Head Office in Farnborough.

The Paraplanner will be responsible for:

- Reviewing Private Client Fact-finds/Client Meeting Notes against defined Compliance guidelines to make sure that ALL aspects of the client financial needs are clearly documented
- Using research tools to ensure independent/holistic advice is provided to the client in line as requested by the Origen Private Client Consultant
- Liaise with consultants and other parts of Origen plus third parties for additional information to support the recommendations put forward
- To prepare suitability reports within an agreed timescale for the client based on the information received/researched, for final approval by the consultant, using technical knowledge and experience plus compliance approved templates/standard paragraphs (where they exist) and soft facts including justification for advice

Candidate Requirements

- Previous Paraplanning experience, preferably including pension advice
- Diploma qualified with an interest to work towards Chartered status (support will be provided under Origen's Professional Development Scheme)
- Attention to detail and the ability to explain complex information clearly and simply is key
- Excellent PC knowledge and ability to operate database systems

Interview Process

- 1st Stage = Telephone Interview
- 2nd Stage = Competent Advisor Test (to be taken at home)
- 3rd Stage = Competency Based Interview

How to Apply

To apply for this role please click on the **Apply** button below.

APPLY NOW

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