

## Private Client Adviser

**Location:** Birmingham (Home based)

**Salary:** Competitive salary, bonus and benefits

### Job Brief

We are looking for a financial adviser to proactively generate new business opportunities using existing clients, leads provided by Origen and self generated opportunities. 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 across a variety of areas, mainly in the areas of investments and pensions
- 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 relevant experience
- Strong communication, negotiation and presentation skills
- Accuracy, 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

1<sup>st</sup> Stage = Coffee Chat

2<sup>nd</sup> Stage = Competent Adviser Test

3<sup>rd</sup> Stage = Competency Based Interview and Role Play

### 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](mailto:hr@origenfs.co.uk)