

# Inshore

INDEPENDENT FINANCIAL ADVISERS



## **Paraplanner/PA**

We are looking for a skilled and enthusiastic Paraplanner/PA to join our team in Highcliffe, Dorset.

You will work directly with the two company directors to enable them to deliver high quality financial advice and service to their clients.

## **Company**

Inshore Independent Financial Advisers Ltd

## **Position start date**

TBA

## **Contract Type**

Permanent

## **Salary**

This will depend upon previous experience and qualifications. You will also benefit from a 4% pension contribution, Death in Service and Income Protection.

## **Hours**

Full Time

- 8.30 – 5.00 MONDAY TO THURSDAY
- 8.30 – 2.00 FRIDAY

## **We are looking for someone who will:**

- Work alongside our existing team of Administrators and Paraplanners to assist the two directors in servicing their clients and providing advice to new clients. This will involve all aspects of holistic financial planning from complex pension reports, estate planning and investments.
- Be a hands-on team player, passionate about making a difference, building relationships and will act as a second point of contact for clients.
- Produce high quality, accurate reports and cash-flow modelling.
- Support the administration team when required.
- Work within appropriate regulatory frameworks and follow our ethical and professional standards.

### **Job Summary:**

- Support the company in delivering a high quality service to clients
- Gather data to support the production of client reviews and pension transfer analysis
- Draft client reviews and suitability reports
- Prepare for client and prospect meetings
- Research technical queries

### **Qualifications and key skills:**

- Must have previous experience as a Paraplanner within the industry
- Must have, or be willing to work towards, a Diploma in Regulated Financial Planning
- Excellent communication and organisational skills
- Attention to detail
- Drive and determination
- Ability to work under pressure and to tight timescales
- Proactive and willing to continue learning
- Problem solving and ability to prioritise
- Working knowledge of Microsoft Office and Adviser Office (desirable)

### **Inshore IFA**

- We provide high quality advice to private clients, businesses, families and trustees. The team consists of 5 advisers and 5 Administrators/Paraplanners. We have a reputation for providing a superior service and we continually strive to improve.
- We combine advice in investment management, retirement planning, pension transfers, tax mitigation, estate-planning and risk minimisation.
- We work closely with accountants, solicitors and other professionals to deliver high quality, joined-up advice to our clients.
- For more details please visit our website [www.inshoreifa.com](http://www.inshoreifa.com).

### **Our Values**

- Work hard, but have fun along the way.
- Always deliver what we promise.
- Constantly strive for improvement.

### **Benefits**

The successful candidate will benefit from a generous remuneration package. We are serious about developing our people, offering full support for exams, in-house training and a straightforward personal development programme to support career progression.

### **How to Apply:**

We would be delighted to hear from you. In the first instance please email your CV and cover letter to [john@inshoreifa.com](mailto:john@inshoreifa.com).