

Trinity Wealth Management is a firm of Christian independent financial advisors based in St Albans, Hertfordshire. We deliver a range of Investments, Retirement products and financial solutions to High Net worth clients. Our values for all aspects of financial planning and investment advice are rooted in Christian biblical principles, delivered with a personal and individual service to our clients.

We have an excellent opportunity for a Technical Paraplanner to join our friendly and professional team. Working with the Senior Paraplanner to support the advisers by providing technical structured advice and recommendations to high net worth clients.

This role would be particularly suitable to an experienced Paraplanner with a minimum of CII Diploma level 4 (DipPFS). We would also be open to candidates who are qualified by experience over a number of years but do not necessarily hold the qualifications.

### **Role Overview**

- Provide paraplanning support to a team of Financial Planners
- Work alongside the Planners on advice strategies
- Research on products and investment strategies
- Use cash flow modelling tool and produce suitability reports
- Assist when required with company research process including platform and product due diligence
- Communicate investment updates to the wider business when required
- Assist in the production of client facing investment update sheets
- Attending client meetings supporting the Financial Planners such as taking minutes, explaining technical details, form completion and follow up action points

### **Key Requirements**

- CII Diploma in Financial Planning or Regulated Financial Planning
- 5 years financial service industry experience including working in a paraplanning role
- Good IT skills covering MS Office, MS Outlook, MS Excel
- Knowledge of Investments, pensions, trusts, taxation, protection
- Fund analysis tools and ideally cash flow modelling tools
- Self-motivated with a passion for their role
- Knowledge of research tools and software

### **Person requirements**

- High level attention to detail
- Excellent grammar, spelling and punctuation skills
- Excellent interpersonal and communication skills
- A high standard of personal organisational skills
- A proven track record in delivering first class client services
- A good working knowledge of regulatory requirements
- Self-motivated with the ability to manage your own workflow

### **Additional Information**

- Salary: Competitive
- Hours of work: 9.00am - 5.30pm
- Location: St Albans

As Trinity Wealth Management offers Biblical Financial Planning to their Christian clients, the successful candidate would need to be sympathetic to the Christian faith and be willing to attend our team meeting and prayer time held each morning.

For more information or to apply please send a CV and covering letter to: Catherine Habershon at [Catherine.habershon@twm.uk.com](mailto:Catherine.habershon@twm.uk.com)

<http://www.christianfinancialadvisors.co.uk/>