Job Title: Financial Planner

Location: London and Hybrid Working

Company: NLP Financial Management

Contract: Full time

Package: Competitive Salary with good benefits

Are you a financial planner with a passion for financial services? Do you thrive in a fast-paced environment and strive to deliver good outcomes for clients? If so, we invite you to join us.

About Us

NLP Financial Management is an award-winning financial services firm based in Swiss Cottage, dedicated to providing comprehensive and personalised financial planning solutions to our clients. We have a strong commitment to excellence and a passion for helping individuals achieve their financial goals.

Position Overview

This is a great opportunity for an enthusiastic individual who has worked for 3+ years in a financial planner role, ideally within a small or medium sized organisation who is keen to develop their skills as part of a friendly organisation in an innovative, rapidly growing business.

We are seeking to recruit an experienced financial planner who is confident in dealing with high net worth clients and will be used to working in a fee charging practice

Key Responsibilities

As a member of the financial planning team, you will work collaboratively with our paraplanners and compliance team to deliver quality and tailored financial planning services to our clients. Some of your responsibilities include:

- **Meeting Client Needs:** An ability to meet clients' expectations and provide them with a regular comprehensive level of service
- **Investment advice:** Providing relevant financial advice
- **New Business:** The ability to develop new business with your own clients and business introducers
- **Investment portfolio management**:. Manage client investment portfolios to ensure continued stability and growth of wealth funds.
- **Client Relationship Building**: Develop strong relationships with clients to retain them and grow the client base.
- **Accountancy Firms**: Working with specific accountancy firms to build relationships and support them in providing a financial advisory service through us to their clients and build the portfolio of clients from such firms.
- **Financial Plans:** In collaboration with financial planners, construct high-quality financial plans for clients in a timely manner, ensuring their accuracy, compliance and adherence to industry regulations and internal standards.
- **Investment Review:** Reviewing client investment portfolios, asset allocations, risk profiles

Key attributes

You must possess the following skills, experience and attributes:

- An ability to communicate at all levels with good written and verbal communication skills
- Excellent interpersonal skills, team player, supportive of others and promoting a positive working environment and culture
- Excellent organisational, analytical and problem-solving abilities
- Excellent attention to detail
- Proficiency in using financial planning software and tools
- Proficiency in navigating and utilising tools / reporting on common platform providers

- Excellent IT skills (Microsoft Word, Excel, SharePoint, Teams etc)

To excel in this role, you should possess the following knowledge and qualifications:

- Excellent product and solutions knowledge from across the market to include but not limited to pensions, investments (in particular, model portfolios as a core solution for clients), inheritance tax planning and protection.
- An excellent understanding of UK financial regulations and compliance requirements
- Qualified to level 6 Advanced Diploma in Financial Planning

Why Join Us

- Competitive salary and benefits package
- Access to ongoing professional development and training
- Collaborative and supportive work environment
- A chance to make a meaningful impact on our organisation

Join our team and contribute to our mission of helping clients achieve their financial goals while advancing your career in the financial services industry.

Application Process

To apply, please submit your resume and a cover letter outlining your qualifications and explaining why you are the ideal candidate for this role. You will find our careers section on our company website at https://www.stonewoodwealth.com/careers/.