



Christopher
Little
& Co.
Financial
Advisers

Paraplanner

Job Description & Person Specification

ABOUT THE BUSINESS

Christopher Little & Co was founded in 1989 and serves clients in the local area, helping them achieve their desired lifestyle through comprehensive financial planning. We use our knowledge and expertise to deliver financial planning and this often includes advice on: Tax, Pensions, Investments and Insurance.

We care deeply about our clients and service we provide. This is epitomised by our fixed fee charges which removes potential conflicts of interest. Fairness and integrity are core values we all hold.

As a modern, small, but growing company, we are looking for the right individual to join our team. A career in financial services is very rewarding when you are helping families achieve their goals and desired lifestyle.

ABOUT THE ROLE

Salary: £28,000 - £32,000 p.a. (FTE) depending on qualifications and experience

Department: Paraplanning

Hours: 30.00 - 37.5 hours per week

Location: Otley - with the ability to work from home subject to experience and training requirements

Flexibility: Opportunity for compressed hours with flexible working

Holiday: 25 days (FTE) plus bank holidays

Pension Scheme: 5% matched employer contribution

- The provision of professional paraplanning support to Advisers.
- Conducting detailed research and analysis across a wide range of holistic planning scenarios.
- Liaison with Advisers to determine the appropriate recommendations for clients financial planning.
- Writing reports and implementing recommendations.
- Working alongside Administrators and other team members.
- Liaising with compliance case checkers.
- Ensuring that all work is completed within the required timescales and to the standards required.

ABOUT YOU

- Proficient in the use of Microsoft Office including Word, Excel and Microsoft outlook.
- Knowledge of Financial Services Industry providers, platforms, analytical tools such as Defaqto Engage and Voyant Cashflow Modelling is desirable.
- Excellent communication skills, both oral and written, including being proficient in the use of technology.
- Excellent report writing and presentation skills.
- Good understanding of taxation and the technical aspects of pensions.
- CII QCF Level 4 Diploma qualified or equivalent (or working towards achieving).
- Analytically minded with ability to work under own initiative and solve problems.
- Good organisation and interpersonal skills.

VALUES

- **Do the right thing:** We act with integrity and are proudly committed to going above and beyond in service of our clients and the support we provide our communities. We treat all clients and team members fairly.
- **Strive to improve:** Always seeking to do better we welcome new ideas and inspiration from all team members. We learn from experience and embrace innovation.
- **Positive working environment:** We know working collectively and being respectful leads to an enjoyable and rewarding working environment with better outcomes for our clients.

EQUALITY OF OPPORTUNITY

Christopher Little & Co is committed to being an equal opportunities employer. The aim is to ensure that all employees are treated equally and are employed solely on the basis of their ability and potential to do the job, regardless of their race, colour, gender, sexuality, disability, age, religion or beliefs.

HOW TO APPLY

Please send your CV along with a covering letter or short video explaining why you are applying for this role to:

tom@christopher-little.co.uk