

Executive, Financial Advice

Job Type: Permanent

Team: Financial Advice

Location: Manchester

Hours: 08:45 - 17:00

Reports to: Manager, Financial Advice

Role Outline

We are a family of investment and advisory businesses at the forefront of the growing UK market for responsible, ethical and thoughtful investing. We adopt a unique approach to looking after money, reflecting the individual objectives of all kinds of clients from private individuals and the businesses they own and work for, to the not-for-profit organisations they help to run.

Do you want to make a world of difference?

We are a values based company. Long term sustainable growth and shared ownership are at the heart of everything we do. Respect and responsibility are very important to us as well as encouraging independence and innovation.

Outline of the role:

- Providing all aspects of client service whilst working closely with qualified Financial Advisers
- Undertaking technical research and producing suitability reports as well as annual client review reports
- Attending client meetings with Advisers wherever possible Maintaining client records and keeping electronic files in good order
- Preparing illustrations, updating client portfolios and investment transfers
- Liaising with clients by email, written correspondence and telephone
- First point of telephone contact for client/provider enquiries

Requirements

- 1 year experience in IFA or similar
- Preferably already working towards Level 4 or willing to
- Working knowledge of IO or AO
- Enthusiasm for self - management
- At least an upper second class degree
- GCSE Maths and English (A-B)
- An aptitude for numeracy
- Fantastic communication skills, both verbal and written
- A keen interest in financial planning
- Operating knowledge of Excel
- A passion for and perhaps an experience of 'making a world of difference'

Apply

Send a CV and covering letter to careers@castlefield.com

Further Information

As this role is part of a group of companies who are directly authorised and regulated by the Financial Conduct Authority, any offer of employment is subject to:

- Successfully completing a credit and criminal records check and subject to potential on-going checks
- At least two satisfactory references (covering a minimum of the last five years)
- Evidence of all relevant qualifications