

Skills Snapshot

Technical Expertise: Detailed knowledge across pensions, investments, protection, and tax planning.

Quality & Compliance: Strong grasp of FCA standards, and suitability report writing.

Workflow Management: Efficient in prioritising, triaging, and delivering cases to agreed SLAs.

Systems Proficiency: Intelliflo, Xplan, FE Analytics, Dynamic Planner, Selectapension, Cashcalc, Fincalc, Microsoft 365, Genovo.

Adviser Support: Skilled at working both directly and in pooled models with multiple advisers.

Professional Approach: Clear communicator, adaptable, and solutions focused.

Ellie Bailey

Outsourced Paraplanner

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Summary

Experienced and adaptable Paraplanner with over 12 years in financial services and 8+ years in dedicated paraplanning roles. Skilled in delivering compliant, high-quality suitability reports and technical research across pensions, investments, and protection.

Having led paraplanning teams within both independent and restricted environments, I bring a strong understanding of differing advice models, provider landscapes, and regulatory expectations. I combine this experience with the ability to implement efficient processes, maintain high technical standards, and support advisers in delivering consistent, client-focused outcomes.

Founder of an outsourced paraplanning business – Paraflo Ltd, providing financial adviser firms with flexible, reliable support across research, report writing, and cashflow modelling, helping firms manage capacity while maintaining quality and compliance.

Experience

Paraflo Ltd – Director/Outsourced Paraplanner

June 2026 – Present

- Founded an outsourced paraplanning company providing research, suitability report writing, technical assistance and cashflow modelling to financial adviser firms.
- Deliver compliant, high-quality technical support to underpin client recommendations across pensions, investments, and protection.
- Manage working relationships and end-to-end paraplanning support, enabling advisers to improve efficiency and focus on client-facing activities.

Succession Wealth Ltd – Paraplanner

November 2025 – June 2026

- Produced suitability reports across a range of advice areas, primarily focusing on workplace/occupational pension transfers, ensuring regulatory compliance and client suitability.
- Supported a pod of Wealth Planners by maintaining consistent report output, managing case progression, and keeping advisers updated. Conducting detailed technical research and analysis to support robust, well-evidenced recommendations.
- Provided technical insight and constructive challenge to strengthen advice and ensure the best outcomes for clients.

Succession Wealth Ltd – Paraplanner Team Leader

March 2024 – November 2025

- Led a national paraplanning function within a restricted environment, overseeing delivery of high-quality, compliant advice reports.
- Managed a team of 14 para planners, driving consistent standards and efficient workflow in a pooled case model. Supported the team through a change project implementing new suitability report templates and assisted in leading this project on behalf of the para planners under my care.
- Improved productivity and turnaround times by implementing triage and accountability frameworks, increasing output by 300%.
- Collaborated with advisers, compliance, and leadership to ensure technical accuracy and alignment with FCA and internal requirements.
- Provided technical oversight on complex cases across pensions, investments, and protection, maintaining high-quality output. Continued to produce suitability reports and research alongside my team.

- Supported process improvements and managed relationships with internal and outsourced paraplanning partners.

Succession Wealth Ltd - Paraplanner

August 2022 – February 2024

- Led a post-acquisition project to reduce a significant report backlog, prioritising cases and coordinating a temporary team of 19 paraplanners while continuing to support three advisers directly.
- Supported team leadership during periods of absence, assisting with oversight, mentoring, and onboarding of new paraplanners.
- Delivered paraplanning support to advisers working with high-net-worth clients, producing suitability reports and conducting technical research across a wide range of planning areas.
- Contributed to a post-acquisition integration as a paraplanner, helping clear a backlog of 80+ cases within a few months

Rothesay Bennett Ltd - Senior Administrator/Hybrid Paraplanner role

March 2021 - July 2022

- Managed 75% of the firm's new business processing, including valuation packs, suitability reports, and administrative tasks such as client onboarding and correspondence.
- Consistently produced over 20 suitability reports per month while supporting IFA admin duties including LOA chasing and new business submissions.
- Oversaw monthly commission reconciliation, ensuring accuracy and timely reporting.

Wren Sterling - Private Client Administrator (FTC - Maternity Cover)

November 2019 - March 2021

- Processed new business and DB pension transfers, ensuring compliance and timely execution.
- Supported client onboarding and adviser servicing for HNW clients.
- Maintained data accuracy on our back-office system via data cleansing and prepared files for client review meetings.

Money Doctor Financial Planning Ltd - PA to Director/Paraplanner

February 2019 - November 2019

- Delivered full paraplanning support including suitability reports and research.
- Managed diary, inbox, and client communications for the Director.
- Supported office operations and client servicing alongside PA duties.

Beaufort Wealth Management Ltd - Trainee Paraplanner/Paraplanner/Technical Administrator

October 2016 - February 2019

- Produced suitability reports and analysis for advisers to ascertain suitable recommendations, and processed DB pension transfers and new business applications.
- Handled group protection renewals for clients and client queries directly.
- Managed withdrawals and prepared MiFID-compliant documentation, for client's annual reviews.

Harrison Beale and Owen Ltd - Financial Services Administrator

September 2015 - October 2016

- Supported all SSAS cases and performed IFA admin duties.
- Processed new business and maintained compliant client files.
- Reconciled monthly commission records.

Beaufort Wealth Management Ltd - Office Administrator

December 2013 - September 2015

- Managed commission tracking and invoice reconciliation.
- Supported LOA processing, policy data collation, and new business submissions for all of the firm's clients.



Qualifications and Training

- 2025: Corndel – Level 5 Operations or Departmental Manager Apprenticeship (Distinction)
- 2024: NCFE CACHE Certificate in Understanding Mental Health First Aid and Mental Health Advocacy in the Workplace (Level 2)
- 2021: Diploma in Paraplanning DipPP (Level 4)
- 2021: Certificate in Mortgage Advice (CeMAP)
- 2013: NVQ Level 2 Business Administration Apprenticeship