



Job Spec: Financial Analyst/Paraplanner

Company: Chameleon Financial Planning Limited

Sector: Financial Services

Contract: Full-Time Employed

Job Location: 5a Marsh Mill Village, Fleetwood Road North, Thornton-Cleveleys, FY5 4JZ. (Candidates from Chorley area would also be considered.)

Company information

Founded in September 2017, Chameleon Financial Planning is an independent whole of market financial advisory business passionate about providing the best financial advice to both individuals and businesses.

The company is very forward thinking with a young, dynamic team. They pride themselves on delivering their clients with an unrivalled service. They utilise a range of market leading technologies as part of their advice processes to help deliver optimum client outcomes.

Due to the rapid growth of the business, they are now looking to appoint an experienced Financial Analyst / Paraplanner to work alongside their existing team.

What you'll do day to day:

As a Financial Analyst / Paraplanner, you'll work closely with an Independent Financial Planner in preparing research, recommendations and producing reports in line with company policy. This is a full-time role located in the Fylde Coast or Chorley area. The work is varied and engaging, ranging from straightforward investment and pension recommendations to more complex areas such as trusts and IHT efficient products. This is an excellent opportunity for a detail-oriented professional who enjoys the technical side of financial planning and wants to contribute to delivering outstanding client outcomes.

Core Duties and Responsibilities:

- Deal effectively with queries from clients and other parties through effective communication.
- Record your client communications in line with company policy in clear and intelligible English.
- Collect and collate information and data about the client in accordance with the principles of know your client and company policy.
- Working with the Financial Adviser, you will discuss clients objectives, identifying and obtaining the information necessary to compile the financial report.
- Liaise with product providers and other third parties to acquire additional information that may be required in order to assess the client's needs and to formulate recommendations.
- Assist in identifying areas for planning and sourcing solutions suitable to meet the client's needs and objectives. This will include assisting in the preparation of tax calculations where necessary.
- Obtain information, quotes, illustrations, product details and provide comparisons for analysis.
- Prepare suitability letters and reports for approval by the Financial Adviser in line with company policy and prepare associated accompanying documentation as required.

We will be a great match if you:

- Are ambitious and keen to pursue a career in the financial planning sector.
- Are looking for an office-based role. We are located in the Fylde Coast, Lancashire, but have satellite locations in Chorley and Kendal (Cumbria).
- Thrive when working as part of a team to achieve a common goal.
- Are organised and can co-ordinate and prioritise work.
- Have a technical/analytical background.
- Be proficient with programs such as Microsoft Word ,Excel and PowerPoint.
- Experience working with Intelligent Office and Voyant not essential but preferred
- 2+ years experience in a paraplanning role
- Strong understanding of investments, pensions, protection, tax planning, and trust structures.
- Proven ability to research, analyse and construct financial planning reports to a high standard
- Ability to manage workloads and meet deadlines in a fast-paced advisory environment
- Excellent written and verbal communication skills
- Strong attention to detail and organisational skills

What can you expect working with us?

Full training and support will be provided, this includes:

- On the job training.
- Examinations paid for up to Chartered status.
- Training on company IT Systems.
- One to one mentoring.
- Potential for progression within the business.
- A diverse, fun, driven team of skilled people.
- A collaborative atmosphere where we strive to deliver an unrivalled client service.

What we offer:

- Pay – Up to £45,000 per annum depending on experience and qualifications.
- Examinations paid (Chartered Qualification)
- 25 day holiday per annum, plus bank holidays
- Week-days working hours of 9am-5pm
- Pension
- Life Assurance
- Personal development to help you learn and grow

How to apply:

Please email your CV and covering letter to info@chameleonfp.co.uk & mike.lovell@chameleonfp.co.uk