

## **Apprentice Trainee Chartered Lifestyle Financial Planner**

**An excellent opportunity** to join a well-established, busy, **Lifestyle Financial Planning** practice. We are looking for someone to join our friendly company and to be a fully integrated member of our team with the ability to further qualify as a **Chartered Lifestyle Financial Planner**. This is a full time, permanent position.

### **Vacancy Full Description**

- Responding promptly and efficiently to telephone, email and postal enquiries
- Maintaining and planning electronic diaries
- Organising appointments, meetings and preparing relevant documentation
- Meeting and greeting clients and offering them refreshments
- Shredding
- Dealing with correspondence, logging, scanning and filing electronically
- Maintaining client details in our back office database
- Sending out letters of authority by scan /post and requesting information from clients/organisations
- Maintaining the Company's state of the art software to a high standard
- Preparing packs for client meetings
- Preparing letters, reports, quotations and other paperwork
- Liaising with external organisations and providers
- Maintaining accurate records in respect of actions taken, to ensure that the process is efficient and professional
- Carry out any other duties requested by line manager to assist with general office duties and to develop the apprenticeship to your full potential
- Assisting with the organisation of Company functions
- You may also be asked to participate in seminars, exhibitions or other company events as required
- Pension dependent on age

***This list is not exhaustive. As progress is made the role will develop with additional responsibilities including:***

- Dealing with clients on a more personal basis
- Working alongside an Adviser to provide advice to clients
- Shadowing an adviser to learn key skills
- Assisting the advice process with full Paraplanning report writing

<b>Salary</b>	Appropriate Apprentice Rate
<b>Working Week</b>	Monday to Friday      9.00 am – 5.00 pm
<b>Contact</b>	The Finance Director
<b>Company</b>	Mike Robertson Associates Ltd
<b>Address</b>	30a High Street, Battle, East Sussex, TN33 0EA
<b>Website</b>	<a href="http://www.mraltd.com">www.mraltd.com</a>
<b>Vacancy Location</b>	Battle, East Sussex

### **Training**

- Apprenticeship via the London South East College
- All Professional Qualifications fully funded by us
- Regular advice and guidance from regulated fully qualified Lifestyle Financial Planners and those newly qualified who have worked through this scheme with us
- We will provide you with all the necessary tools to be a successful fully Chartered Lifestyle Financial Planner

## Preferred Qualifications

GCSE English & Maths grade C / 4 or above (or equivalent qualifications)

## Desired Skills

- Good IT skills –particularly Word, Excel, PowerPoint and Outlook.
- The ability to learn and master state of the art Industry-based software packages
- Good organisational, communication and interpersonal skills
- The ability to work on your own and use your own initiative
- Ability to prioritise
- The ability to work effectively as a member of a team
- A willingness to think corporately and to work to ensure the success of Company initiatives and developments
- The ability to be able to work under pressure accurately and with attention to detail

## Personal Qualities

- You should have a positive attitude
- Be willing to ask questions
- Be prepared to work hard and study to achieve Industry Standard exams
- Be reliable, enthusiastic and motivated
- Have a major interest in the Financial Industry
- The ability to converse with all age groups
- Ability to retain Client Confidentiality

## Reality Check

**Additional study for exams required outside of working hours**

**Continuous Professional Development**

## Future Prospects

The goal is for you to become a fully qualified Chartered Lifestyle Financial Planner. This takes hard work and dedication. You will learn every aspect of Lifestyle Financial Planning Advice and we will provide you with all the professional qualifications that you will need to become a successful **Chartered Lifestyle Financial Planner**.

***Only interested parties should apply for this position.***

***Please send a copy of your CV, quoting the code: [WEB/230818](#), to the Finance Director at the address as detailed above. Thank you for your interest.***