

## Financial Planner Vacancy

A new opportunity exists to join our team of Financial Planners

*NB: This is a regulated position: Please do not apply if you do not hold at least the diploma in financial planning and be eligible for a statement of professional standing from an accredited body.*

Due to an expanding client base, we wish to recruit a further qualified Financial Planner (taking the team up to 9 advisers).

We are particularly interested in hearing from you if you are either:

- A qualified and experienced paraplanner looking for an adviser role
- You are a qualified adviser working within a bank assurance or restricted/tied advice environment and want to develop your skills as a whole market Independent Financial Adviser.

The successful applicant will:

- Deliver excellent client outcomes, operating within a regulated framework to deliver the company objectives. This could be with new or via a review with their existing clients
- Deliver a comprehensive financial planning and advice service to their clients, ensuring advice is to the right quality
- Provide advice across all need areas, as most appropriate for the client,
- Need to be adaptable to be able to work in office, or client business or homes as deemed appropriate by client needs.
- Able to deliver on a range of business KPIs to enable the business to meet its objectives.
- Achieve best practice in compliance and skills against agreed benchmarks.

We will provide full support to develop the skills you need to be a successful Independent Financial Adviser. As a Chartered firm, we will also expect and financially support further study up to Chartered Financial Planner level and the successful applicant can expect to develop their career rapidly.

Additional benefits including a quarterly and annual performance related bonus scheme, 25 days holiday (in addition to statutory holidays) rising to 30 days with service; life assurance and Private Medical Insurance are provided after a qualifying period.

A role profile will be provided on request to eligible applicants, please contact us at [info@avtrinity.com](mailto:info@avtrinity.com).

*All information has been prepared with care to ensure accuracy and is based upon our understanding of legislation and HMRC practice, which can be subject to change. This is intended to provide information only and should not be considered as advice.*