

Senior Financial Planning Technical Support – Cheltenham

Do you have experience of supporting Financial Planners? Are you currently studying towards your Diploma in Financial Planning? Are you looking for an employer that will support further study and offer career development alongside an excellent benefits package? If so, please keep reading!

Attivo Group is looking to recruit several ambitious and hardworking candidates to work within our Technical Support team.

This is a unique opportunity to become a member of the Senior Technical Support team and develop your career utilising the excellent study support that we provide.

The purpose of the Senior Technical Support team is to provide support to the Financial Planning team to ensure the smooth processing of client requirements.

We provide our advice and service through Attivo Financial Planning, one of the very few genuinely Independent, Chartered, Pension Transfer Specialist, financial planning firms in the UK.

We aim to deliver the most professional, technically competent, independent advice and service to our clients. We want to be seen as a leader in the financial planning sector, to help change the standing of financial planning to be recognised as a genuine profession and to ensure we, and the profession, contribute positively to society and the economy.

Main responsibilities

- secure and deliver information from the initial data gathering request so that it can progress through to completion
- liaise with product providers and insurance companies in order to obtain policy and plan information in a timely manner
- assist Financial Planners with portfolio reviews via analysis, compilation and completion of in-house client reports
- maintain CRM system in order to keep Financial Planners updated throughout the processing of business in accordance with Service Level Agreements
- delivery of tasks to include data gathering and client reporting
- continuously review own and team's workflows and processes and offer support to other colleagues where appropriate
- ensure clear and concise communications to all internal and external parties to prevent delays
- in coordination with other members of the Senior Financial Planning Technical Support team, ensure that all housekeeping is maintained up to date to enable the smooth and efficient running of the department.

Qualifications, skills and experience

- experience of working in an FCA regulated environment
- experience in the financial services industry, working for an Independent Financial Adviser
- minimum 5 GCSEs graded A-B, including Maths and English
- CII exams are desirable
- good understanding of pensions and investments
- good understanding of compliance processes and issues
- excellent interpersonal, listening, numerical and IT skills
- strong analytical and research skills
- good organisational, time management skills and effective caseload management
- ability to work on own initiative, sometimes for long periods of time
- professional, ethical and discreet
- ability to build and maintain ongoing client relationships

- ability to work well under pressure while maintaining excellent attention to detail
- a desire and drive to obtain industry qualifications and embrace career progression within the company.

Salary and benefits

£18,000 up to £28,000 depending on experience and qualifications.

Attivo Group also offers:

- excellent company benefits package including a non-contributory Pension Scheme, Private Medical Insurance, Income Protection, Critical Illness and Death in Service
- generous holiday allowance
- corporate gym membership
- parking allowance for employees who live over 1.5 miles away from the office (Cheltenham only)
- regular company social events
- charity days
- excellent culture, promoting employee wellbeing and engagement.

How to apply

For further information, please get in touch. To apply for this role, please email your CV along with a covering email or letter to careers@attivogroup.co.uk.

Privacy Policy

If we have received your details in response to a recruitment initiative, we will store the personal information that either you, your recruitment agent or another third party has provided us with. We process that information because it is in our legitimate interests to do so in order for us to be able to make an informed decision about whether to interview you and, ultimately, recruit you.

We believe that you would reasonably expect us to process your personal information in this way and that such processing does not have an impact on you in a way that would make this processing unfair. Where your personal information is kept as part of a file relating to prospective employees of Attivo Group, we will retain that information and any information relating to that matter. This is so that we can review the file if any complaints or issues arise after the recruitment process. The length of time that we keep prospective employee files is usually 3 months after conclusion of the relevant recruitment process.

Unless you request us not to do so, we may also contact those individuals who are referred to in any information you provide us with, for example referees. This contact may be made by telephone, e-mail or post. We will only do this if we have your express permission to contact them in this way.

Where you have provided us with personal information about a referee or a previous employer, it is your responsibility to inform that person that you have provided us with their details and that we will be processing it in connection with your employment application. You should also give them our contact details (below) should they wish to discuss this with us. Click [here](#) to view our full privacy policy for prospective employees.

Agencies

****We are unable to offer this position to recruitment agencies so we respectfully ask that agencies do not contact us in regard to posts advertised on this site****

November 2018