

Relationship Manager – London

Do you have experience in a client-facing role? Are you currently studying towards your Diploma in Financial Planning? Are you articulate and able to present to a range of stakeholders? If so, please keep reading!

We are recruiting for a Relationship Manager to cover London and the South East (field based). The role is to act as an ambassador for Attivo Financial Planning, building trust and confidence with existing and prospective private professional partners, retired advisers and introducers to increase revenue and profitability through new business and client retention.

We provide our advice and service through Attivo Financial Planning, one of the very few genuinely Independent, Chartered, Occupational Pension 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

- identify, qualify and monitor new business opportunities to generate new private and corporate clients, using existing relationships and connections
- attend events and contact targeted businesses. Meet prospective clients, understand their circumstances and requirements, and articulate how we can help satisfy their often complex needs with appropriate products or services
- assist the acquisitions process to aid the successful integration of new client bases
- assist the Acquisitions Manager in undertaking due diligence of prospective vendors. You will make initial contact with all clients and manage the on-boarding process.
- help internal stakeholders to understand prospective clients' circumstances and requirements to increase client retention. You will make recommendations and provide a detailed brief on each prospective client and ensure all client records are accurate.
- maintain good relationships with retired advisers who have sold their business to us.

Qualifications, skills and experience

- minimum 5 GCSEs graded A-B, including Maths and English
- educated to degree level would be an advantage
- studying towards the diploma in Financial Planning is preferable
- extensive and proven experience in a client-facing role
- experience of working in Financial Services and a desire to develop a career in the sector
- experience articulating complex ideas, concepts and solutions to a variety of clients with a broad range of interests, requirements, knowledge and experience
- articulate, presentable, entrepreneurial and have a commercial awareness
- ability to forward plan and manage business demands and expectations
- appreciation of business processes, systems and technology
- full UK driving licence.

Salary and benefits

£25,000 to £34,000 (plus company car) 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****

January 2019