

Training and Competency Officer (field based)

Attivo Group is recruiting a Training and Competency Officer to join our team. The role is predominantly field based, supporting London and the South West and you will be responsible for supporting the delivery of the training and competency requirements across the business. We have offices in London, Cardiff and Cheltenham so travel will be required between the offices.

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

- attend client meetings, observing the Financial Planners and developing their ability to provide compliant and excellent client service
- ensure compliance procedures are adhered to at all times to protect and safeguard the company, meeting the regulatory aspects of the role
- support the Compliance function by undertaking periodic audits of annual reviews, in line with the compliance monitoring plan, ensuring compliance with the principal's regulatory obligations
- develop product, technical and regulatory knowledge to keep up to date with latest financial regulations.

Qualifications, skills and experience

- minimum 5 GCSEs graded A-B, including Maths and English
- qualified to QCA Level 4 Diploma standard or above
- ideally hold a relevant industry supervision qualification such as J07 or AF6
- good understanding of compliance processes
- excellent interpersonal, listening, numerical and IT skills
- good organisational and time management skills
- effective caseload management
- professional, ethical and discreet
- previous training and competency and sales management experience.

Salary and benefits

£45,000 to £55,000 (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