

## Chartered or Diploma Telephone Financial Planner – Cheltenham and London

Attivo Group has an exciting opportunity for a Telephone Financial Planner to join the growing teams in our Cheltenham and London offices.

This is a unique opportunity to become a member of the Financial Planning team and develop your career.

You will provide telephone-based financial planning support to clients and deal with their ongoing servicing requirements to build, develop and deepen relationships with the Group's growing client base.

We pride ourselves on the training and development support we give our employees to attain further qualifications. You will be given full study support as well as a very rewarding and prosperous career.

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**

The aim of this role is to provide first class long term tax and financial planning services to ensure clients' needs are satisfied compliantly and efficiently, and to maximise new business opportunities retaining the Group's growing client base.

You will be provided with full paraplanning and administration support from an office based team, allowing you to focus on delivering exceptional service to our clients.

### **Qualifications, skills and experience**

You must have at least three years' experience working as a Financial Planner and will have a proven track record providing high levels of advice. Ideally you will hold Chartered status, however, we will consider advisers who are working towards this. You will be provided with full paraplanning and administration support from an office-based team to allow you to focus on delivering exceptional service to our clients.

We are looking for someone who has:

- a comprehensive knowledge of pensions and investments
- good understanding of compliance processes and issues
- excellent interpersonal, listening, numerical and IT skills
- strong analytical and research skills
- excellent report writing and written/verbal communication skills
- good organizational and time management skills and effective caseload management
- experience in the financial services industry, working for an Independent Financial Adviser
- previous financial planning experience
- ability to work on own initiative, sometimes for long time periods
- professional, ethical and discreet

- ability to build and maintain ongoing client relationships
- ability to work well under pressure while maintaining excellent attention to detail.

### **Salary and benefits**

£35,000-50,000 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
- free town centre parking 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](mailto: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\*\***

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