

Paraplanner

Opportunity

There is currently an opportunity to join Balance: Wealth Planning as a paraplanner working either from our office in West Bridgford, Nottingham or in Derby city centre.

The role could be full-time or part-time to suit you. Salary dependent on experience.

About you

We are looking for someone who is supremely organised and efficient, with outstanding written and verbal communication skills.

We are open to considering people with different levels of experience – so you might have a year's experience as an administrator in a financial advice firm, or you may be an experienced paraplanner already. We may be able to shape the role to fit you and can provide training.

If you don't have that experience but you're a quick learner, hard-working and looking for an opportunity to get into an incredible rewarding career, just tell us why we should consider you. What's most important is that you have the **qualities and strengths** we're looking for.

You will be looking for the opportunity to work for an innovative and forward-thinking company, which will support you with your qualifications and career progression.

The role

Depending on your level of experience, you will be responsible for:

- Production of cashflow forecasts.
- Production of financial planning advice reports.
- Attending client meetings.
- Data collection, research and analysis.
- Advice implementation and follow through to completion.

What makes us interesting

- We offer holistic financial planning advice to our clients – predominantly affluent individuals and families.
- Passive investment approach.
- Cashflow forecasting as standard.
- We charge fixed fees, not a percentage of assets under management.
- We support and encourage flexible working.
- Shortlisted for innovation awards.
- Owned by two Chartered and Certified Financial Planners.

Find out more about us: www.balancewealth.uk

If you are interested in discussing this opportunity further, please get in touch with your CV in confidence now. Rebecca Aldridge: rebecca@balancewealth.uk or 0115 7722126.