

Financial Planner

Opportunity

There is currently an opportunity to join Balance: Wealth Planning as an employed financial planner (IFA) based from our office in West Bridgford, Nottingham.

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

About you

We are looking for someone who will be a great fit in our team and who has great personal skills with clients.

We are open to considering people at different stages of their career – so you might be just starting out as a financial planner, or you could be working as a successful self-employed adviser. Chartered or Certified Financial Planning qualifications would be ideal but not essential.

You will be looking for a good work/life balance, doing what you love in a professional environment, and working for an innovative and forward-thinking company.

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.
- Emphasis on planning, not products.
- We charge fixed fees, not a percentage of assets under management.
- Independent and directly authorised.
- We support and encourage flexible working.
- Shortlisted for innovation awards.
- Owned by two Chartered and Certified Financial Planners.
- Offices in Nottingham, Derby and Chester.

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.