

Personal Specification – Paraplanner

Below are some of the skills, knowledge and experience which are required for this post.

	Essential	Desirable
Education / Qualifications		
GCSE or equivalent at grade A-C (9-4) to include English and Maths.	*	
Level 3 certificate in Financial Services or equivalent.	*	
Level 4 diploma in financial planning or equivalent or be working towards this.	*	
Skills/ Knowledge/ Experience		
1+ year experience working in financial planning support or paraplanning role.	*	
Some experience in working in a regulated environment with requirement to adhere to governance and statutory guidelines.	*	
Be able to evidence up to date technical knowledge in financial planning services and compliance requirements.		*
Advanced competency levels in Excel, Word, Outlook.	*	
Ability and willingness to take the initiative and take responsibility for own workflow and prioritisation.	*	
Experience of working in a team, with strong team contribution ethic and experience of working to support other team members and follow their instructions.	*	
Experience providing a high quality, client-based service.	*	
Excellent written and verbal communication skills, with strong attention to branding, house styles and grammar.	*	
Excellent time management skills, with experience in managing own work schedule and that of senior team members who have a demanding workload.	*	
Personal Behaviours & Qualities		
Ability to work effectively under tight deadlines or a large workload.	*	
Ability to work under own initiative.	*	
Flexible with willingness to occasionally adapt working hours to fit with peaks of business.		*
Be able to demonstrate a professional and committed work ethic with high personal standards to completion of work.	*	
Ability to respond to challenges in a calm manner.	*	
Evidence of taking full responsibility for all work and tasks assigned to you.		*
Willingness to build on personal technical knowledge and to take professional exams where required.	*	
Ability to demonstrate behaviours and expectations consistent with the David Allen values of ambition, professionalism, knowledge, integrity, and respect.	*	
General		
Ability to travel between offices if required.		*