

Person Specification – Independent Financial Adviser

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

	Essential	Desirable
Education / Qualifications		
GCSE or equivalent at grades A*-C (9-4) in Maths and English.	*	
RQF Level 4 diploma in financial planning or equivalent.	*	
Skills/ Knowledge/ Experience		
Experience working in a Financial Adviser role.		*
Paraplanning experience or experience providing financial planning support.	*	
Ability to evidence up to date technical knowledge in financial planning services and compliance requirements.	*	
Excellent computer skills, ability to use Word/Outlook/Excel to a high standard.	*	
Excellent written, verbal, and interpersonal communication skills.	*	
Excellent time management skills, ability to manage and prioritise own workflow in order to meet deadlines and targets.	*	
High levels of accuracy and attention to detail.	*	
Experience providing a high-quality, client-based service.	*	
Strong networking skills. Ability to proactively generate new enquiries and prospects to further grow the business.	*	
Personal Behaviours & Qualities		
Strong sense of team; willing to contribute to the business success of the firm, an interest in helping others develop.	*	
Ability to work well under pressure and respond to challenges in a calm manner.	*	
Willingness to build and maintain your knowledge of key financial products, services, and regulations.	*	
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 and to undertake client home visits if required	*	