

Job Description: Financial Adviser or Trainee Financial Adviser

Network Insurance & Financial Planning is recognised as an industry leading Independent Insurance Broker & Independent Financial Adviser renowned for offering friendly and professional advice with the best interests of its client at heart.

A new opportunity has arisen within our Financial Advice Division; and we are looking for someone ambitious and hungry to join our expanding team to look after an existing client base as well as seeking new business opportunities.

This is an all-round role, requiring the candidate to handle a variety of policies for individuals and corporates, including but not limited to investments, pensions, protection policies and employee benefits.

Previous experience and suitable qualification is preferred, but not essential.

We are looking for someone who is very client focussed where relationship building is key and the client's best interests are at the forefront of every decision.

Our clients are very loyal and attracted by the excellent service we offer; and are made up of a variety of personal & corporate clients so customer service and good negotiating and interpersonal skills are essential.

The role is mostly office based, but the successful candidate will also be required to attend meetings outside of the office within the Bailiwick of Guernsey.

This position will suit a confident and outgoing individual looking for an opportunity with potential.

Main duties will include:

- Initial meetings with clients to discuss circumstances / Fact Finding;
- Research and potentially write reports with advice for clients;
- Presentation of advice to clients;
- Application for plans or policies with clients;
- Any reviews with clients;
- General administration and maintenance for client files and records (eg due diligence gathering, risk rating and profiling, keeping details up to date on system);
- Ad hoc meetings and problem solving for clients;
- Sourcing new clients to bring to the business (targets will be set – once qualified and authorised);
- Keep up to date with providers and products available to clients – including meetings with relationship managers;
- Ensuring fees paid by providers, and monitoring trail fees;
- The candidate will be responsible for their own diary management and should be able to work on their own, as well as within a team;
- Performance of required CPD and recording on suitable programme (eg CII CPD Log);
- The candidate will be able to work within Company guidelines and ensure work is fully compliant with internal as well as GFSC regulations; and
- Any other tasks that may be required from time to time to ensure clients receive good service, and the company remains compliant with GFSC regulations as amended from time to time.

Who will this appeal to?

The candidate will already be working in a similar role, maybe working for another adviser, or looking to get back into the industry – or perhaps working elsewhere in the finance industry and looking for a change.

We are interested in proactive, customer focused people who can spot opportunities and act in the moment.

A smaller, growing team means the candidate will have higher impact and accountability - whilst also having all the technical and soft skills support and development they need.

What will the candidate need?

Client satisfaction is a key priority in this role, and we are looking for a strong relationship builder, whose technical abilities consistently aid the retention of clients to Network.

- Level 4 Qualification such as Dip PFS or similar, or above (or willingness and ability to work towards this promptly);
- Excellent interpersonal skills - both on the telephone and face to face
- Able to work on your own initiative;
- Good administration skills;
- Good organisational skills - ensuring company processes and procedures are followed;
- Results focussed;
- Customer Service oriented;
- Proactive and positive;
- Flexible and able to work as part of a team;
- Ideally, a clean driving License

The Package

Salary is negotiable depending on experience and there is a defined career path with responsibility being given at an early stage and fast track up the ladder for the right individual. The role benefits from a decent basic salary, team discretionary bonus, death in service cover, healthcare benefit, holiday entitlement that increases with service, travel insurance and all other general insurances at cost.