

## **KMD Private Wealth Management Ltd**

### **Paraplanner/Technical Analyst**

We are seeking to recruit an experienced Paraplanner with first class skills to join our friendly team. The role will be based at our Stansted Mountfitchet offices.

This is a rare opportunity to participate in our finely tuned team approach to client service. It will involve working closely with our Technical Analysts as well as Chartered Planners, Wealth Managers, Relationship Managers and Investment specialists to deliver exemplary client service.

#### **Responsibilities will include:**

- Attendance at client meetings [90% take place in-house]
- Preparation of advice letters and recommendations eg investments and pensions
- Preparation of content for annual review meetings
- Preparation of pension, income drawdown and investment reviews
- Preparation of detailed cash flow models
- Undertaking research to support recommendations
- Provision of technical support to complex client queries
- Liaison with clients

#### **Essential skills & experience**

- Understanding of the Financial Planning process
- Excellent client facing skills
- Articulate and able to produce detailed and accurate work
- Good report and letter writing skills
- Excellent inter-personal skills, both written and verbal
- Ability to multi-task and prioritise effectively
- IT Skills - fully competent in desktop applications (proficient in Microsoft Word, Excel and Outlook)
- Experience in working with a back office system
- Ability to work independently and as part of a team
- Able to take accurate client meeting notes
- Have experience of using cashflow forecasting software

#### **Desirable skills**

- Have experience supporting a senior adviser/advice team
- High level of technical knowledge regarding Pensions
- Used to dealing with High Net Worth clients
- Experience in writing complex and detailed reports for cases

#### **Qualifications Essential**

Diploma in Financial Planning

#### **Desirable**

Certified Financial Planner  
Chartered Financial Planner  
Other technical qualifications