

Description	Senior Paraplanner – Full Time
Salary	£50k pa
Working hours	37 hours pw
Benefits	Pension / PMI / DIS
Geographical Area	Chesterfield, Derbyshire
Workplace	Office – Hybrid for right candidate
Reports to	Paul Rodgers

This is a new role resulting from the growth of Lync Wealth Management Ltd, a national firm of advisers established in March 2023.

We are looking for a motivated, experienced Senior Paraplanner to head up our paraplanning team located across the country and to provide technical paraplanning. This role is a blend of high-level technical expertise and team development.

- Working towards Chartered status or Advanced Diploma
- Responsible for the continual training and mentoring the paraplanning team
- Leading, coaching and developing junior paraplanners, may include one to one meetings depending on experience
- Ensure procedures, skills matrix and training plans are in place for the team and new starts and when gaps are identified the relevant training has been put in place
- Effective WIP management Paraplanners ensuring deadlines are met and the relevant support is given where required
- Demonstrate advanced application of technical knowledge and skills, showcasing an ability to undertake highly technical, analytical and precise work to a consistently high standard
- Covering any additional work across team functions when required when there is limited capacity and be the point of escalation for any issues that arise within the team
- Participate in any projects and relevant business initiatives that will improve the processes across the team
- Standardising and improving processes across the business to ensure consistency and efficiencies with the team and using Intelligent Office where possible
- Working with the Case Review Team on complex cases & where necessary guiding advisers for the best client outcome

Key Competencies & Qualifications

- Hold minimum Level 4 Diploma, ideally working towards Chartered status of Advanced Diploma
- At minimum 5 years industry experience
- Proficient in using research software Defaqto, FE Analytics, Cashcalc and Microsoft Word & Excel
- Ability to work under pressure
- Excellent interpersonal and verbal/written communication skills

SM&CR Requirements

- You must act with integrity.
- You must act with due skill, care and diligence.
- You must be open and cooperative with the FCA, the PRA and other regulators.
- You must pay due regard to the interests of customers and treat them fairly.
- You must observe proper standards of market conduct.

NOTE: This is not an exhaustive list of duties. The Company also reserves the right to vary or amend the duties and responsibilities of the post holder at any time according to the needs of the company's business.