

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

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.**