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## Job Description: Paraplanner

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<b>JOB TITLE:</b>	Paraplanner
<b>SALARY:</b>	Competitive
<b>HOURS:</b>	37.5 per week
<b>ANNUAL LEAVE:</b>	25 days
<b>RESPONSIBLE TO:</b>	Paraplanner Manager
<b>POST BASED AT:</b>	Datum House, Electra Way, Crewe, CW1 6ZF
<b>DURATION OF CONTRACT:</b>	Permanent

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### **JOB DESCRIPTION**

This job description gives an outline of the main duties of this post. It does not form part of the contract of employment and may be changed from time to time in consultation with the post holder.

### **Main Aims of the Post**

- i) To provide technical and research support to the planners.
- ii) To prepare reports for clients.
- iii) To assist the Paraplanner Manager and compliance department where required.

## **Prepare Suitability Reports**

- Prepare full suitability reports
- Prepare summary of recommendations for administrators to prepare the client pack
- Liaise with administrators and planners on any required amendments
- Ensure all recommendations meet with company standards

## **Product Research**

- Liaise with the planner to agree the best course of action
- Research the most suitable product and tax wrapper
- Take into consideration wider circumstances; tax position, income etc.
- Use O & M, Analytics and any other available research tools
- Calculations such as carry forward, CGT and bond calculations.

## **Fund Analysis**

- Prepare research on existing investment and pension funds using Analytics and O&M
- Compare with appropriate funds/portfolio for the clients attitude to risk
- Prepare replacement contracts report for IFA to review prior to suitability

## **Follow Compliance Standards**

- Question Planner recommendations if applicable
- Discuss any cases that are not clear with the paraplanner manager or compliance department

## **Process Development**

- Provide feedback on all processes where required
- Suggest improvements to any processes
- Work with the paraplanning team to improve efficiencies

## **Meetings**

- Weekly Paraplanner Meeting
- Quarterly Staff Meeting
- Ad Hoc Technical Meetings