



## PARAPLANNER – SALISBURY OR REMOTE – FULL TIME OR PART-TIME - SALARY DEPENDENT ON QUALIFICATIONS AND EXPERIENCE

We are a friendly outsourced paraplanning company working with small financial planning firms across the UK. Since our launch in May 2017, we have been expanding every few months, and we are now looking for another paraplanner to join us and help us support our growing client base.

As a Navigatus paraplanner, you will be comfortable working with several financial planning firms, preparing research, writing suitability reports and financial plans, and answering technical queries covering a wide range of planning areas.

You will deliver outstanding customer service to financial planners, their firms and their clients to ensure all agreed service standards are met and the work is of the highest quality at all times.

### HOW DO YOU KNOW THIS IS THE RIGHT ROLE FOR YOU?

We'd love to hear from you if:

- You have a passion for financial planning and achieving the best outcomes for the client – we always do what's right, not what we're asked to do.
- You are happy to work independently and without supervision – we don't do micromanagement here.
- You are naturally good at prioritising and planning your own workload, and you work well under pressure – things are generally very busy and sometimes get even busier.
- You excel at writing – sure, we all love a clever spreadsheet, but being able to explain complex technical concepts with a bit of flair and in a way that can be easily understood by a client while being grammatically correct will definitely get you noticed.
- You have an eye for detail, and you're happy to peer-check the work of others while being gracious about the feedback you receive about your own work.
- You have the confidence to challenge financial planners and your colleagues politely and constructively.
- You enjoy using different types of software and a range of research tools on a daily basis. You're comfortable working with complex documents, and you're no stranger to building a spreadsheet or two.
- You have a creative and open-minded approach to financial planning, and you are willing to continuously learn and develop.

## WHAT ABOUT EXPERIENCE AND QUALIFICATIONS?

Your starting salary will depend on the combination of your paraplanning experience and technical qualifications. However, we have a range of abilities and experience in our team and plenty of work to match against these different skill sets to ensure everyone is sufficiently challenged and continues developing at their own pace.

Therefore, it is more important for us that you have the right attitude and sufficient passion and enthusiasm for the role and that you can successfully work as part of our team than a set number of years' experience or specific qualifications.

While we will currently struggle to take on anyone who is brand new to the industry, if you've taken and successfully passed some financial planning exams and have worked in the role, and you feel this is the role for you, we want to hear from you.

## WHAT DO WE OFFER IN EXCHANGE?

We want you to love coming to work (whether you're actually coming to our Salisbury office or making the treacherous journey to the desk in your spare bedroom), and while only you can make it happen, we will help by:

- Providing a friendly and supportive working environment.
- Not expecting you to hit the ground running – there's always a period of adjustment when changing roles, whether you've been paraplanning for 2 or 20 years.
- Giving you a varied and challenging workload – we can promise that time will fly!
- Encouraging you to constantly learn by taking exams, attending professional events, or volunteering your knowledge and skills in the wider paraplanning community.
- Giving you the flexibility to adjust your hours as needed during the week – we know that life happens!

In addition, every Navigatus crew member benefits from:

- Pension scheme
- Group life cover
- 25 days of annual leave
- Plus a day off on your birthday (provided it falls on a weekday)
- And an extra day off at Christmas
- Exam support and additional study leave before the big day
- PFS membership (or equivalent)
- Access to a range of other staff benefits, including telephone and online GP for the whole family, virtual gym glasses, and lots of useful discounts.

## HOW TO APPLY?

If this sounds like a role for you, please email Aleks at [aleks@navigatus.co.uk](mailto:aleks@navigatus.co.uk) explaining why you feel we're right for you and enclosing a copy of your CV (or a link to your LinkedIn profile if that's easier).