

SG WEALTH MANAGEMENT

Person Specification – Paraplanner/Trainee Wealth Manager

Requirement	Essential or Desirable?	How Assessed?
Qualifications / Education / Training <ul style="list-style-type: none"> Level 4 Diploma qualified (or working towards this) Advanced Pension qualification (AF3 / G60) Chartered, or working towards 	Essential Highly Desirable Desirable	CV, copies of certificates
Experience: <ul style="list-style-type: none"> Paraplanner role within IFA Practice (at least two years) Providing advice on defined benefit pension schemes / pension conversions Proficient usage of Microsoft packages (Word, excel, PowerPoint, Teams, email, etc.) Suitability report writing Intelligent Office or similar back office system Experience of using Truth (or similar cashflow software), wrap providers, Selecta Pension (or similar), Financial Express Analytics etc. Understanding cashflow software, and integrating the output into a financial plan 	Essential Desirable Essential Essential Highly Desirable Highly Desirable Essential Highly Desirable	CV and interview
Knowledge: <ul style="list-style-type: none"> Strong Financial services knowledge (including in depth understanding of pensions and investments) CGT and IHT planning Understanding of compliance terminology, including FCA rules, regulations, policy and procedures 	Essential Essential Essential	CV, interview and selection tests, if required
Skills & Abilities: <ul style="list-style-type: none"> Excellent communication skills both written and verbal and ability to adjust to meet target audience needs Ability to work alone with minimum supervision and within a team and contribute to the team (ideas, suggestions) Strong organisational skills with flexibility to meet different tasks, requirements and expectations whilst remaining calm, and be able to prioritise accordingly whilst meeting deadlines Strong analytical skills with attention to detail and accuracy. Ability to problem solve using various techniques Ability to construct detailed bespoke financial planning reports, without the reliance on template wording Ability to construct complex retirement plans taking into account clients' circumstances, objectives, tax planning opportunities and the inclusion of different types of investments and pensions Ability to analyse and comment on various Lifetime Allowance and Annual Allowance scenarios Ability to make recommendations involving alternative investment such as VCTs, EIS and Business Relief investments. 	Essential Essential Essential Essential Essential Essential Essential Essential Essential Essential	Interview Interview Interview Interview and selection tests Interview Interview and selection tests Interview Interview and selection tests Interview

Personal Attributes: <ul style="list-style-type: none"> ● Self-motivated ● Ability to make decisions and use own initiative (within set guidelines) ● Positivity and cheerful outlook (can do approach) 	Essential Essential Essential	Interview Interview Interview
Other: <ul style="list-style-type: none"> ● Willing to study for further relevant professional qualifications (if relevant) ● Keen to learn from others to develop within the business into the Wealth Management role ● Business-like appearance 	Essential Essential Essential	Interview Interview Interview