Paraplanner

About Us

Beacon Wealth Management is looking for a Paraplanner to join our well-established Chartered Financial Planning firm.

Based in Kimbolton, Cambridgeshire, this role is ideal for a dedicated professional with prior paraplanning experience to support our Financial Advisers and help deliver strong client outcomes.

Role Overview

You will play a crucial role in supporting our Financial Advisers by producing high-quality reports, conducting thorough product research, and ensuring our clients receive tailored financial solutions that align with their goals.

You will have a strong understanding of financial products and services, in-depth knowledge of the UK financial market, and a solid grasp of FCA regulatory requirements. You'll thrive in a collaborative environment, enjoy problem-solving, and take pride in delivering work of a consistently high standard.

What you will be doing

- Provide comprehensive paraplanning support to our financial advisers, including data analysis, report writing and generating suitability letters tailored to client goals.
- Conduct whole-of-market research to identify suitable financial products, maintaining thorough records of all recommendations and supporting documentation.
- Interpret and process information from adviser meetings, liaising with providers to obtain outstanding details and ensure cases progress smoothly.
- Ensure all work is compliant with FCA regulations and internal policies, while staying up-to-date with legislative and technical developments.

- Maintain accurate training, competence, and CPD records, manage provider platform access and actively support the delivery of our ongoing service.
- Participate in regular team meetings, maintain strong relationships with Broker Consultants and help train and mentor other team members as needed.

About you

- Level 4 Diploma in Financial Planning (or equivalent)
- 2 years' experience in a paraplanning role
- Strong working knowledge of FCA regulations
- Comfortable using financial planning software and provider tools
- Work and communicate effectively with colleagues, clients and stakeholders, whilst demonstrating a strong commercial awareness.

As a member of non-advising/qualified staff, whilst all help and assistance should be given to both clients and prospective clients over administrative issues, under no circumstances should advice be given that might be construed to be financial advice.

What we offer

- Competitive Salary
- Generous Employee Benefits Plan
- Pension contributions matched up to 5%
- 35-hour week with a 4pm finish on Fridays
- 20 days holiday (increasing 1 day per year up to a maximum of 23) plus Bank Holidays, 3 days at Christmas, and your Birthday off
- Flexible and Hybrid working available
- Regular team-building activities

How to apply

Please send your CV to Alex Larkins at alarkins@beaconwealth.co.uk