Job Title: **Wealth Planner**

Department:	Wealth Planning
Location:	Mayfair
Salary	Competitive salary plus a generous benefits package
Contractual Hours	Full-Time Equivalent (37.5 hours per week)
Job Summary	We are looking for a Wealth Planner to provide financial planning advice to new and existing Killik & Co clients with more complex financial planning needs, and to take an active role in business development activities for the Firm.
Key accountabilities	• Deliver technically excellent financial planning advice to clients using Killik & Co Wealth Planning processes; • Proactively working with the Investment Managers to identify new Wealth Planning opportunities for existing clients; • Develop new client relationships; • Conduct business activities in a compliant manner, in line with the rules set out by the firm and the regulator; • Work effectively with other members of the team to deliver an efficient and outstanding client service.
Competencies/skill set	• Getting things done • Communication & Sharing Knowledge • Customer Service • Effectiveness & Adaptability • Team Working • Business Development • Driven
Qualifications/experience required	Essential • Minimum of Level 4 CII qualification (Diploma in Regulated Financial Planning or equivalent) • Previous experience in providing financial planning advice to complex clients • Demonstrable experience of business development activities Desirable

- Chartered CII
- Previous use of cash flow modelling tools is advantageous

To apply, please email your CV and cover letter to recruitment@killik.com.

We are committed to ensuring a fair and inclusive process. If you require any reasonable adjustments under the Equality Act 2010 (for example, accessibility support or alternative formats), please let us know in advance so we can make the necessary arrangements. Your personal information will be handled in accordance with the UK GDPR and our privacy policy.

Recruitment Process

At Killik & Co, we are committed to conducting a fair, consistent, and transparent recruitment process. While the structure may vary depending on the position, candidates can typically expect the following stages:

1. **CV Review** – All applications are anonymised, then assessed against the essential and desirable criteria outlined in the role profile.

2. **First Interview** – An initial conversation designed to explore your professional background, core competencies, and motivation for the role.

3. **Second Interview** – A more detailed discussion with the hiring team, which may include technical questioning, competency-based evaluation, or discussion of relevant experience.

4. **Third Interview (where applicable)** – For certain roles, an additional stage may be required, such as a presentation, case study, or meeting with senior stakeholders.

5. **Offer or Decline** – Following completion of all interviews, we will communicate the final outcome. Successful candidates will receive a formal offer subject to any required pre-employment checks.

While we endeavour to respond to all applications, this may not be possible for vacancies with high volumes of applications.