

Job Title: Trainee 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 To provide administrative support to the Killik & Co Wealth Planning team whilst developing the required competencies and technical knowledge, and undergoing the Firm's internal Trainee Adviser Program to progress within the team, with the ultimate aim of becoming a client-facing Wealth Planner.

- Key accountabilities**
- Studying towards Regulated Diploma in Financial Planning (CII DipPFS)
 - Proactively participating in the training sessions provided
 - Using initiative to learn on the job about Wealth Planning work
 - Working as part of an Adviser Team, supporting them with all aspects of administration for clients and prospects
 - Data input into systems available to the Wealth Planners and production of simple reports generated by some of the systems
 - Assist the Planners in organising annual reviews with clients
 - Contacting prospects and clients to book in meetings and to keep them updated
 - Preparing letters of authority and sending them out to providers
 - Liaising with product providers and other third parties to obtain all necessary information on clients' existing arrangements
 - Compiling information received in an easy-to-understand format as preparation for other team members to conduct their analyses
 - Implementation of new business
 - Obtaining product research
 - Pre-populating forms
 - Maintaining an up-to-date file
 - Supporting the wider Wealth Planning team with administrative work as required
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- Competencies/skill set**
- Getting things done
 - Communication & Sharing Knowledge
 - Customer Service
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- Effectiveness & Adaptability
 - Team Working
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Qualifications/experience required

Essential

- Previous experience in financial services required, ideally within a Financial Planning, Pensions or Accounting environment
- Previous experience of business development activities
- Previous experience of report-writing
- Good working knowledge of Word, Excel and PowerPoint

Desirable

- Progress towards CII DipPFS is desirable but not essential
 - Experience of using cashflow modelling software is useful but not essential
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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.