Job Title:	Junior Paraplanner
Department:	Wealth Planning
Location:	Ipswich
Salary	Competitive salary plus a generous benefits package
Contractual Hours	Full-Time Equivalent (37.5 hours per week)
Job Summary	To work within the Technical Support Team (TST) in supporting the completion of initial financial planning reports and annual reviews for Wealth Planners. Support the Wealth Planning Product Liaison Team in the completion of all administrative work relating to product research, initial financial planning reports, annual reviews and preparation of client facing documents.
Key accountabilities	• Liaise with Product Liaison, Wealth Planners and Technical Support Team to ensure all required information for report production is obtained in a timely manner. • Prepare letters of authority and letters appointment as requested by Wealth Planning team members. • Assist Product Liaison Team obtaining third party policy information, pro-actively contacting providers to ensure agreed timescales are met. • Assist Product Liaison Team in the completion of third-party policy analysis. • Maintain administration records to provide a clear audit trail of all third-party provider contacts. • Maintain up to date client records in iO/CRM and Voyant. • Obtain product research, information and new business illustrations as requested by Wealth Planning team members. • Ensure product research is kept up to date. • Produce annual reviews and initial client reports within agreed timescales.

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- Obtain and prepare paperwork required for client meetings and business submission.
- Build technical knowledge.

Competencies/skill set

Competencies

- **Getting Things Done**
  Delivers on agreed objectives promptly; prioritises workload; remains professional under pressure.
- **Communication & Sharing Knowledge**
  Confident, clear, and accurate with all communication. Maintains accurate records and makes effective use of new technology.
- **Customer Service**
  Positive attitude to find solutions in line with TCF principles. Uses management feedback to improve service.
- **Effectiveness & Adaptability**
  Able to maintain a high volume of work, striving for continual improvements. Understands individual contribution in relation to Administration Team and Technical Support Team objectives. Presents a positive image and approach to change.
- **Team Working**
  Shares knowledge, skills, and experience with colleagues; understands team goals; is cooperative and supportive of others.

Skills

- Client focus and concern for quality ensuring client satisfaction and retention.
- Attention to detail.
- Actively participate in the sharing of knowledge with Wealth Planners, Technical Support Team and Product Liaison Team.
- Maintain a full and proper understanding of the financial services market.
- Deal with issues promptly and appropriately regularly updating Product Liaison Team and Technical Support Team.
- Training & Development – follow structured plan to develop technical skills to progress to full Paraplanning role.

Qualifications/experience required

- Previous experience within financial services, with exposure to client interactions, financial administration, and ideally pensions and/or investment products.
- Working towards, or having successfully completed, three or more CII qualifications (preferably R01, R03 and/or R04), with a commitment to ongoing professional study and technical development.
- Strong proficiency in Microsoft Office applications, including Excel, Word and PowerPoint.
- Educated to A-level standard (or equivalent).

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

In order for us to have all information to hand prior to submitting your application, please could you indicate the following:

- Your notice period
- If there are multiple location options for the role, please state your preference or if you are happy to be considered for all.
- We appreciate that salary can be a sensitive topic to discuss at this early stage, but to help ensure we're aligned from the outset and respectful of your time, could you please let us know your current salary and salary expectations? This allows us to make sure the opportunities, and salary ranges we can offer are suitable before progressing further.

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.

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