

## JOB DESCRIPTION

26 February 2025

### **Job Role: Financial Planner**

#### **Job Purpose:**

To be a pivotal part of Trinity Wealth Management's service in providing high-quality bespoke financial planning, with wealth management and investment strategies to our clients, whilst upholding the Biblical Principles and Christian values of the company.

#### **Responsibilities:**

##### Clients

- Meet with new clients to understand their situation and needs recognising/ appreciating their level of knowledge, financial goals, lifetime objectives, investment preferences and risk tolerance. The aim is to build a strong and long -term relationship with your client
- Gather comprehensive and detailed financial and lifestyle information from clients and other third parties and analyse to identify areas for improvement, opportunities and risks
- Meet with existing clients (6 monthly, annually or as agreed) to understand any lifestyle changes and other factors that may impact on the client's achievement of their objectives/goals
- Take clients through a lifestyle financial planning journey providing advantages and disadvantages of products and recommendations to justify planning decisions made. Help clients make well-informed decisions about their financial plan/portfolios
- Provide a friendly point of contact for technical enquiries from clients (and team members and other third parties)
- Source new clients and build relationships with other professionals and Christian individuals/organisations

##### Financial Planning Decision Making and Presentation

- Identify suitable products and solutions to meet client's needs, financial aims, objectives, investment preferences and risk tolerance and oversee detailed cash flow models and technical reports/policy recommendations
- With the help of Paraplanners research, make informed investment recommendations to clients, based on client goals and risk assessment on our investment products and asset allocation strategies
- Responsible for overseeing the technical accuracy, compliance and concise plans/reports/other documentation produced by the team
- Deliver complex financial concepts in a clear easy to understand format/language (whether written or verbal)

##### Team support and other duties

- Work collaboratively with other Financial Planners, Paraplanners and the Administration Team to ensure a consistent and high quality client experience
- Maintain accurate client records on back-office system, platforms and other IT systems
- Proactive approach to keeping up-to-date with the marketplace, compliance, legislative changes and new technical information. Findings communicated to the team, where necessary, to ensure that the company remains compliant with FCA procedures and third party audit processes



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- Attend/contribute to internal meetings to understand/support/help define the company's approach to client service and financial planning
- Ensure CPD/training requirements are met and maintained
- Be part of our daily Prayer Time

### Required Skills and Experience:

#### Essential

- Minimum of 5 year's experience working as a Financial Planner/Advisor, preferably as an IFA
- Practising Christian with the ability to apply Biblical Financial Principles
- Ability to build client relationships through a genuine desire to help individuals meet their financial goals
- Excellent understanding of the Financial Planning process and products including a good awareness of compliance
- Good communication skills, both written and verbal with an ability to explain complex information simply and concisely
- An understanding of income tax, CGT, IHT, trusts and pension transfers (DC and DB)
- Interest in and knowledge of financial products and markets
- Good maths and IT skills
- Eye for detail with an ability to deliver accurate, relevant and timely output
- Dedication and the willingness to work as part of a team and independently
- Clean driving licence

#### Preferred (in addition to the above)

- Chartered or Certified Financial Planner qualified