PRYDIS

POWER IN NUMBERS

Paraplanner

Reporting to Operations Director

Location Exeter

Summary Prydis is a multi-discipline professional practice, affording you the opportunity to work alongside other professionals, helping to provide clients with integrated solutions to meet their needs.

Responsibilities, defined but not limited to;

- Checking all paperwork / information is available to ensure that the client file meets the FCA's rules and requirements.
- Undertake research to identify suitable solutions to meet the clients' needs and objectives.
- If applicable, liaise with the clients' legal and tax advisers.
- Collate quantitative detailed information required to compile complex suitability reports.
- Write technical suitability / strategy reports which are easy to understand by the client.
- Complete application / proposal forms.
- Act as a sounding board for financial advisers to conclude on the best course of action for clients.
- Review investment portfolios and compile suitable portfolios targeting a desired level of risk.
- If required, attend client meetings with adviser.
- Attendance at Prydis "Lunch and Learn" seminars (where relevant).
- Training and supervision of junior staff (where relevant).
- Providing assistance to the Prydis Wealth team (where appropriate).

Relevant skills

Ideal candidates will be able to demonstrate a high level of technical knowledge, across various financial products, and computer literacy across the main elements of the Microsoft suite of products. They should also possess good prioritisation and time management skills, to ensure adviser and client expectations are met.

How to apply

Please email your CV and a covering letter to adamprestwood@prydis.com.

Prydis Group are an Equal Opportunities Employer.