CLARION

Creating better lives for successful family people who value trusted advice

Our Core Values

- Look after people
- Be positive
- Provide solutions
- Deliver quality
- Do it with style

About Clarion

Our story

Clarion's origins go back to 1985 and our founder, Ron Walker, was one of the co-founders of the Institute of Financial Planning (IFP) way back in 1987.

Since then, Clarion has been at the forefront of the financial planning profession and were one of the first financial planning firms in the UK to use cashflow modelling tools (originally Prestwood Professional & now Voyant). All of our financial planners are Chartered, as are the majority of our Associate Financial Planners, and we are also a Chartered firm.

Nowadays, many financial planning firm says that they put the client at the centre of everything they do, but we really mean it. We invest time in our clients, truly care about the outcomes and have a long track record of delivering over decades.

We pride ourselves on being one of the most respected Chartered financial planning firms in the UK, we also have a discretionary investment management arm to the business and have our own range of Open Ended Investment Companies meaning the working day is varied and interesting.

As of April 2022, we currently have 19 members of the team but are looking to rapidly expand and double in size within the next 3 years, whilst making sure that we maintain our exceptional standards.

Find more out about us by visiting our website: https://clarionwealth.co.uk

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Our offices

Clarion is now based in leafy Alderley Edge, in the heart of Cheshire. Our purpose-built offices opened in 2017 and we believe are one of the most desirable around.

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Our offices

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Recruitment – Associate Financial Planner

Our ambitious growth plans means that we are recruiting and there are lots of progression opportunities for the right people. We are currently recruiting an Associate Financial Planner

At Clarion, we prefer to refer to Paraplanners as Associate Financial Planners (AFPs) to reflect the importance of their role in the advice process, rather than being seen as report writers. Our AFPs attend all client meetings and will develop a really close relationship with clients, often becoming the main contact for day-to-day queries.

We have an exceptional team of Associate Financial Planners within Clarion with representatives of the company winning the prestigious Paraplanner of the Year awards in 2015 and 2020. The main responsibilities of Associate Financial Planners at Clarion are:

- Ensuring Curo (our back-office system) and Voyant records are immaculate and up-to date.
- Preparation for all meetings:
  - Following Clarion's processes to 'deliver' the adviser to a great meeting.
  - Preparing the meeting agenda and proactively considering planning angles.
- All meeting follow up
  - Producing excellent meeting minutes and delivering against all agreed action points.
  - Preparing compliant yet client-friendly advice files (including Suitability Reports) that look good, flow properly and make sense.
- Management of the client relationship and handling any issues between meetings
  - Form a lasting, trusting relationship with clients by delivering excellent service.
  - Develop in-depth knowledge of clients' personalities, aims, objectives and their financial situation.
  - Handle all issues arising that the Adviser Client Support (Administrator) cannot handle and that do not require the involvement of the Financial Planner.
  - Liaise with clients' other professional advisers as/when required.
- Ensure clients' Financial Plans always 'make sense'
  - Be aware of the 'big picture' – the holistic view of clients' affairs and their financial plan.
  - Worry about your client's financial plan, they are placing their future in our hands!

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To deliver a first-class service, we work in financial planning teams consisting of a Financial Planner, and Associate Financial Planner and an Administrator (Adviser Client Support or ACS).

Each member of the financial planning team has a crucial role, and we can only continue to deliver great client service when every member is performing at their best as part of a cohesive team.

Our clients regularly feedback to us that they really value this more personal approach, and we believe that it is this that sets us apart from many other advisers in the local area.

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About You

Your story

Clarion is a demanding place to work in. We demand the best from ourselves and from each other, so it's really important that you're self-motivated and take pride in your work. As a boutique business, it is also vital that you can work collaboratively with others.

We are also looking for the following qualities:

Knowledge & Experience

- First class technical expertise with knowledge of the difference between financial planning and financial advice.
- Ideally level 6 qualified (Chartered / Certified) although we will consider exceptional Level 4 candidates with appetite to take more exams until they reach the pinnacle of their vocation.
- Experience using financial planning software (preferably Voyant)
- Experience of using Curo, Dynamic Planner, FE Analytics, O&M Pension Profiler, Assureweb and Defaqto Engage.
- At least 3 years' experience in a Paraplanning role at a financial planning firm.

Skills

- Ability to read, digest and assimilate information efficiently.
- An eye for detail and accuracy.
- Highly organised, methodical, analytical and disciplined.
- Solutions (not problem) orientated.
- Excellent verbal and written communication skills.
- Excellent IT skills, particularly in the use of Excel and Word.

Behaviours, Values & Attitude

- Genuine desire for a long-term career as part of a happy and motivated team, delivering fantastic service to clients.
- Demonstrable adherence to Clarion's Core Values
- Assertiveness
- Client focused
- Proactive
- Team player
- Willingness to develop yourself and others

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The package:

We provide a highly competitive package, which we have detailed below:

- Salary of £35-45k dependent upon experience and qualifications.
- Support to achieve recognition for national awards.
- Discretionary annual bonus.
- 30 days holiday, excluding bank holidays.
- Group Personal Pension Provision
  - Matched contributions up to 10% of salary (20% total).
  - Salary exchange scheme with all employer NI savings invested into your pension.
- Death in Service Benefits (4 x Basic Salary)
- Healthcare Scheme (cashback scheme)
- Bike to Work Scheme
- Examination support (study leave, financial support and bonuses)
- Gym Membership
- Electric Car Scheme
- Flexible Working (Hours to be fulfilled between 8-6)
- Private Medical Insurance

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Interested?

Email your CV to Alistair Cartwright at acartwright@clarionwealth.co.uk

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