

## **JOB DESCRIPTION – Associate Financial Planner**

**Far Peak Business Park, Northleach, Gloucestershire**

**Full Time | Hybrid – Predominately Office Based**

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### **About de Lisle Financial Planning**

We are a growing financial planning practice based in the Cotswolds, helping successful families, professionals and business owners make better financial decisions and achieve greater clarity, confidence and peace of mind.

We believe financial planning is about far more than products and investments. It is about building trusted relationships, understanding what matters most to clients and helping them make informed decisions throughout their lives.

We are ambitious about the future of our business, but equally committed to maintaining the personal service, integrity and high standards that our clients value.

- Do you want to build a meaningful career in financial planning?
  - Are you naturally curious, commercially aware and motivated by helping people make better decisions?
  - Do you enjoy building trusted relationships and taking ownership of your own development?
  - Are you looking for a role where you can learn, grow and gradually take on greater responsibility rather than being expected to know everything from day one?
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### **The Opportunity**

This is not a traditional adviser role. Nor is it a sales-focused position requiring you to build your own client bank. Instead, this role is designed for somebody who wants to become part of an established business and develop into a trusted financial planner over time.

Initially, you will work closely with James and Sarah, supporting client relationships, learning the business and developing your technical and professional capability.

As your confidence and experience grow, you will progressively take responsibility of client relationships and planning responsibilities.

This is a genuine long-term career opportunity for the right person.

## **Purpose of the Role**

To support the delivery of outstanding client service whilst developing the knowledge, skills and confidence required to become a trusted adviser within the business.

The successful candidate will contribute to client servicing, financial planning support and relationship management whilst undertaking a structured development journey into a future adviser role.

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## **Key Responsibilities**

### **Client Relationship Support**

- Prepare meeting packs and supporting documentation
- Support the delivery of ongoing client service
- Build strong relationships with clients, providers and professional connections
- Ensure client records remain accurate and up to date

### **Financial Planning Support**

- Attend and contribute to client meetings
- Assist with research and planning activities
- Support implementation of recommendations
- Coordinate actions with providers and third parties (including outsourced para planning)
- Develop understanding of pensions, investments, protection and cashflow planning
- Ensure work is completed to regulatory and compliance standards

### **Business Contribution**

- Identify opportunities to improve client experience and internal processes
- Support operational projects and events where appropriate
- Contribute positively to team culture and business development
- Demonstrate ownership, initiative and professionalism

### **Personal Development**

- Progress professional qualifications
  - Develop technical expertise and planning knowledge
  - Build confidence in client-facing responsibilities
  - Participate actively in coaching, mentoring and development opportunities
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## **What Success Looks Like**

### **During the First 12 Months**

- Successfully integrates into the team
- Builds trust with colleagues, clients & partners
- Demonstrates strong ownership and accountability
- Learns systems, processes and planning philosophy
- Develops technical knowledge and confidence

### **Longer Term**

- Takes responsibility for selected client relationships
  - Leads client conversations effectively
  - Demonstrates sound judgement and professionalism
  - Becomes a trusted adviser within the business
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## **Skills & Attributes**

We are likely to be a good fit for someone who:

- Is naturally curious and enjoys learning
  - Builds trust and rapport easily
  - Communicates professionally and confidently
  - Demonstrates emotional intelligence and self-awareness
  - Takes ownership and follows through on commitments
  - Is organised and detail-oriented
  - Values teamwork and collaboration
  - Is service orientated and motivated by helping others
  - Will understand that the needs of the client, team and business are paramount
  - Gets involved in the general duties of the office to maintain a lovely working environment
  - Supports business focused charity events and/or fundraising
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## **Experience & Qualifications**

### **Essential**

- Strong communication and relationship-building skills
- Experience in a professional working environment
- High levels of organisation and attention to detail
- Strong IT and administrative capability
- Genuine interest in financial planning and helping people
- Must have own vehicle, clean driving license and ability to travel to client meetings
- Likes dogs!

### **Desirable**

- Experience within financial services
  - Progress towards Level 4 Diploma
  - Experience supporting clients or stakeholders
  - Interest and openness to using AI tools and technology
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### **Benefits**

- Salary dependent on experience £35-50k
  - Annual bonus (company bonus subject to business/individuals' targets being met)
  - Employer pension contribution 8%
  - Fully funded professional qualification support
  - Structured development pathway – internal and Plannex support programme
  - Attendance to industry events where appropriate
  - Hybrid working arrangements – Mon–Thurs in office and Fri at home – kit provided i.e. laptop, docking station, extra monitors
  - 25 days holiday pa plus bank holidays (including 7 compulsory days to be taken over compulsory Xmas shutdown)
  - Holidays increase by 2 days per year up to max of 30 days pa, plus bank holidays
  - Access to Far Peak facilities inc. gym, Secret Sauna, etc
  - Cotswold Collective perks membership
  - Free parking
  - Ongoing coaching and mentoring
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### **How to Apply**

We're partnering with Recruitment Rebellion Ltd ([recruitmentrebellion.co.uk](http://recruitmentrebellion.co.uk); 07711 876 033; [simon@recruitmentrebellion.co.uk](mailto:simon@recruitmentrebellion.co.uk)) to recruit for this opportunity.

Please submit your CV. Shortlisted candidates will be invited to provide a short covering letter as part of the next stage, addressing:

1. Why this opportunity appeals to you
2. What attracts you to financial planning as a career
3. The type of working environment where you perform at your best
4. What success would look like for you over the next five years

We are looking for someone who wants to grow with the business, contribute meaningfully and build a long-term future with us.

Only shortlisted candidates will be contacted. This vacancy may close early if a suitable applicant is identified.

We are committed to a fair and inclusive recruitment process. If you require any reasonable adjustments, please let us know.