

Independent Financial Adviser

IEP Financial are a directly authorised Independent Firm who have established themselves over the past 25 years. We are now seeking to expand further by adding an experienced IFA to our team in Hove & Eastbourne.

Perhaps you are an IFA who requires a little more professional support through paraplanning and business admin so you can focus on your clients? Or you require assistance with generating leads and new clients. You may wish to develop into a director role in the future, and want the security of an employed position?

We are offering an opportunity which has the prospects to develop into a Director role and become a shareholder. There is full support provided by a dedicated team of Administrators, Paraplanners and Business developers. The successful candidate will be introduced to an existing client pool, however, we are looking for an IFA who has access to their own client bank and / or proven skills in being able to self-generate business.

To join IEP Financial, you will be a level 4 qualified adviser with the drive to obtain chartered status in the future and with a strong work and team ethos.

On offer is a basic salary which is negotiable depending on experience, a successful reward structure and competitive benefits package.

To discuss this role in confidence, please contact David Williamson on 01273 208813 or email david.williamson@iepfinancial.co.uk. The full job specification is detailed below.

Role purpose

Financial advisers provide clients with advice on financial matters, making recommendations on ways to best achieve their objectives. The role involves researching the marketplace and advising clients on the products and services available, ensuring they are aware of and understand those that best meet their needs.

You will need to be diploma qualified (Level 4) and can advise on the full range of products.

Responsibilities

- Contacting clients and setting up meetings, either within an office environment or in clients' homes or business premises.
- Conducting in-depth reviews of clients' financial circumstances, current provision and future aims.
- Analysing information and preparing plans best suited to individual and corporate clients' requirements.
- Completing risk analyses.
- Researching the marketplace and providing clients with information on new and existing products and services.

- Designing financial strategies.
- Assisting clients to make informed decisions.
- Researching information from various sources, including providers of financial products.
- Reviewing and responding to clients' changing needs and financial circumstances.
- Negotiating with product suppliers for the best possible rates.
- Liaising with financial services providers and other professionals.
- Keeping up to date with financial products and legislation.
- Producing financial reports.
- Contacting clients with news of new financial products or changes to legislation that may affect their savings and investments.
- Attending networking events.
- Developing professional connections.
- Maintaining and updating individual continued professional development plans monthly, to be reviewed periodically by the Compliance Officer.
- Maintaining compliance with the FCA rules and principles for Approved Persons and Code of Practice.
- Meeting the regulatory aspects of the role, e.g. requirements for disclosure, costs of the services provided, and also the advised products.
- Act ethically, impartially and always in the best interests of clients.
- Follow the internal IEP processes and procedures.
- Ensure IEP meet the expectations of the FCA with regards to treating customers fairly.
- Act in accordance with the terms and conditions of your employment contract.

These duties are not to be regarded as exhaustive and you may be required to perform such other and/or additional duties within your skill-set and competence as the company may require.