

Financial Planner

Ovation Finance is an award-winning firm that helps its clients and employees accumulate life, not just wealth. We're a firm with strong principles and a firm believer in doing the right thing. The best test we use is "Would you advise your Mum to do that?". We take great joy in the work we do for our clients and take pleasure in seeing them create the lives they want to live.

Who are we and why would you want to join us? We're a warm and welcoming team who have created a harmonious, approachable and easy-going environment. We trust each other to get the job done which creates a sense of pride and ownership in what we do. We will always do the right thing by our clients and each other. We care about the environment and our social impact on society, which is why we're extremely proud to be a certified B Corp firm.

You'll be nurtured through your professional life, with internal and external training and exam support provided. We're a non-judgmental team who have a willingness to learn and take the time to celebrate success! We're transparent with our pay bands so all employees can see what they need to do to increase their pay and move into the next pay band.

We care about your personal life and want to ensure our employees have the right work-life balance. We nurture this through flexible working, mixing home working and office based, of which full home working equipment is provided. Family comes first which means we'll provide flexibility to fit around your family. We value supporting employees, which is also why we offer full paternity pay and enhanced maternity pay.

What makes us really different is that we're employee owned. What this means is that you'll become a co-owner of the business as a beneficiary of the Ovation Employee Ownership Trust. We find this brings a sense of pride and ownership to our roles and everyone is able to positively impact the business and have their voice heard. Financially, you'll benefit from profit share at the end of the year. Everyone is entitled to their share, so based on the remaining profit at the end of the year, everyone gets a piece of the pie!

THE ROLE

Ovation Finance is looking for a Financial Planner to join their expanding team. The role will include taking over some existing review clients but there will be a focus on generating new business to build your client bank. You will be provided leads that Ovation generate but there will be a focus on growth and generating new business.

You will have a team to support you, including other advisers, paraplanning services, administrators and a client relationship manager. You will work closely with all members of the team who will assist with the client journey.

You will be involved in the continuous development of Ovation's advice and investment proposition.

Contractual Elements

- Annual salary - £50-70K plus benefits
- Non-contributory pension scheme (7% of all earnings paid into pension scheme)
- Employee Ownership Trust profit share
- Death in Service cover of 6 x annual salary
- Sick pay at full salary for 6 months
- 25 days holiday, plus statutory holidays, plus additional long-service holiday to maximum of 30 days (all based on full time employee)
- Private Medical Insurance after successful completion of probationary period
- Health Club cash-back

REQUIREMENTS *Essential:*

- Qualified to level 4 CII Regulated Diploma in Financial Planning
- Started level 6 qualifications and are progressing towards Chartered Status
- Have a good understanding of the regulations and requirements in a Financial Advice business
- Bristol Based
- Be prepared to network and generate new business

REQUIREMENTS *You will ideally:*

- Have a minimum of 5 years experience in a Financial Advice business and an understanding of the financial advice process
- Excellent organisational and planning skills, this includes project & time management
- Excellent written and verbal communication and numeracy skills
- Be innovative, creative and proactive
- Enjoy and thrive upon interaction and collaboration with others
- Share our Values of Integrity, There's More to Life than Money, and not advising anyone to do something you wouldn't ask your mum to do!

We are also open to Senior Planners and those with an existing client bank who are looking for a stable and progressive firm as a home for their clients.

Ovation Finance is committed to encouraging equality and diversity among our workforce, and eliminating unlawful discrimination.