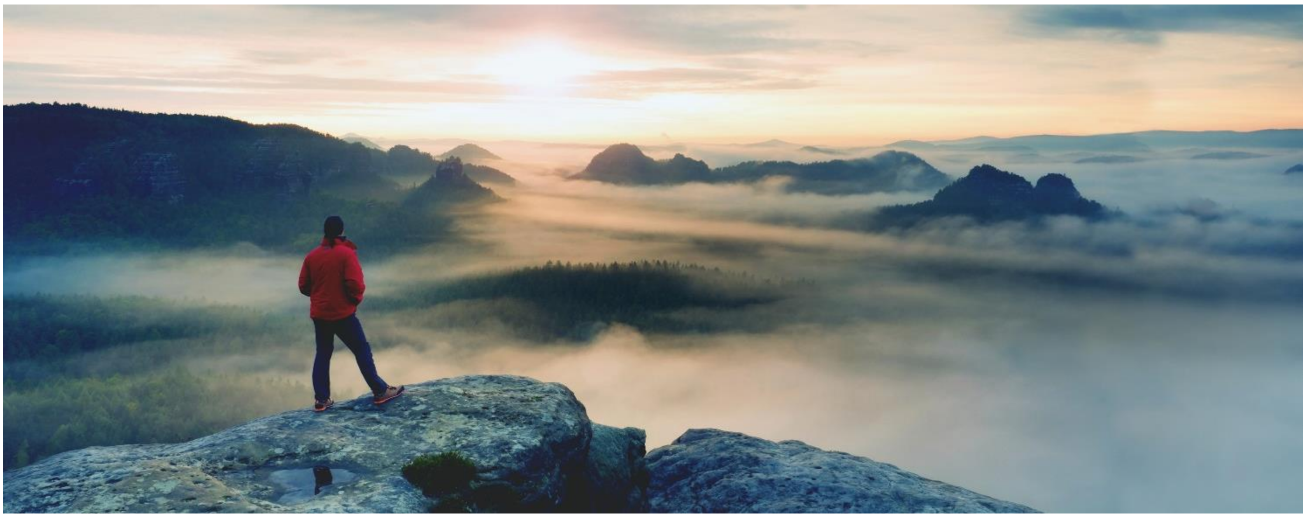

Financial Planning Associate – Wealth Management

Full time

About the role

The role of a financial planner is to ensure clients are advised holistically in all areas of their financial affairs. The aim is to build a financial strategy to meet a client's objectives. The first step is finding out what clients really want to achieve and then trying to assist them, considering retirement planning, advising on investments or savings strategies as well as looking at any potential risks and how these can be mitigated.

As a Financial Planning Associate you will have the opportunity to work on a range of diverse clients and from creating and delivering presentations, building a cash flow planning model to reviewing an investment portfolio. Whatever the challenge, you will build lasting relationships with your clients and colleagues in different teams around the firm.

New joiners in this team have the opportunity to study towards the relevant qualification in Financial Planning. The qualification covers the financial services market and regulatory context, investment principles, key product areas and technical / advisory skills. The training consists of private study and regular exams as well as on-the-job-training, building not only on your technical skills but also on your personal and professional development. You will have paid study leave to support you in the run up to exams and all course and exam fees are paid for.

Is GE right for you?

A dynamic and evolving organisation which puts individuals at the heart of its business. We provide exciting opportunities across our firm, enabling our team to achieve new heights in their career. Here you will be challenged, supported and most importantly heard, enabling you to develop your skills and grow professionally and personally.

You will receive hands on training, personal development and support from leading and seasoned practitioners, partners and experts in their field, enabling you to quickly grow your knowledge and expertise and excel in your chosen career.

How we give back

To ensure our employees know how much we value their hard work, we offer an extensive benefits and perks package. Our package covers your lifestyle, health and wellbeing, development and finances. How about an additional day off to celebrate your birthday? Or utilising our in-house mentoring scheme? And access to our Work Life Well platform? These and many more perks are included in your GE employee benefits pack. To see the full list, click here.

What will the role entail?

Responsibilities

- Learn the financial planning process and how this is applied in the profession to client specific circumstances.
- Assisting with the preparation of reports and research for meetings and advice to clients.
- Learn about the possible solutions that can assist our clients.
- Learn how to use client management software and systems in order to prepare client advice reports.
- Learn about the compliance and regulatory aspects of the profession to which you must adher.
- Build strong relationship with the wider accountancy practice.

Requirements

- You are able to build meaningful, collaborative relationships with both clients and team members.
- You are keen to take ownership from an early stage and have a willingness to exceed client expectations whilst managing different needs and having the desire to get work done
- You are committed to self-development & learning with the ability to prioritise your time to studying and working simultaneously.
- You are of a curious nature with the interest and willingness to know what drives people in order to understand what they want to achieve
- You have a strong attention to detail and strong time-management skills along with the ability to work quickly and under pressure

Want to learn more about life at GE?

Use the QR code below to hear what our team have to say.