Servicing Adviser

Location: Whiteley with travel

Salary: Highly Competitive Package including company car, bonus and comprehensive benefits package

An excellent opportunity has arisen for a Financial Reviews Advisor to work in our busy head office in Whiteley. You will be employed by the Practice, working as part of the team at Eight Wealth Management Ltd who are an Appointed Representative and Principal Partner of St. James's Place Wealth Management Plc.

This business is well established and highly successful.

St. James's Place Wealth Management plc (SJP) is a leading, and highly regarded, FTSE 100 UK Wealth Management company which distributes a range of Investment and Retirement products and financial solutions to a High Net Worth client base. SJP has funds under management in excess of £90bn.

The Role – Financial Reviews Adviser

Providing the highest standard of service to our clients will be of the upmost importance to you. You will be providing support to our wealth management consultants, conducting annual reviews to service existing clients. You will pass on new leads to the relevant consultants should they arise out of the service review meetings, therefore you will not be expected to provide financial advice to clients. You should however have the knowledge and understanding of life, pensions and investment products, in order to discuss these with clients to understand their requirements.

The Person – Financial Reviews Adviser

This is a fantastic opportunity to undertake an interesting and challenging role that would suit a confident, numerate and professional individual who enjoys using their initiative and has a 'can do' working style. You may well be a Graduate and you will have been working in Financial Services or Wealth Management for several years. You will have obtained or be progressing towards the CII Financial Services Diploma - Dip PFS.

Importantly, you are committed to a career in Wealth Management and are looking to expand and develop your existing knowledge and are actively looking for a career where you will be servicing existing clients.

Please note that this Partner Practice will conduct a standard Financial and Identity check on any candidates who are offered a role within this Practice.