

## Financial Planning Technician

**Job title:** Financial Planning Technician

**Start date:** ASAP

**Location:** Nottingham, UK

**Salary:** dependent on experience

**Job conditions:** This is a full-time, permanent position

### About the role

We are seeking an experienced Financial Planning Technician to join our ever-growing team. As a Financial Planning Technician at Fiscal Engineers, you will provide support, information, recommendations and financial analysis to the Financial Planners in order to provide our clients with excellent service and outcomes. You will act as a point of contact for clients and deal effectively with their queries, as well as preparing client files for review meetings and occasionally, if necessary, attending review meetings with advisers. Other responsibilities include, but are not limited to, providing technical and research support to the Financial Planners in respect of our clients and providing drafts of investment updates and other client communications to the Financial Planners for consideration.

### About you

Passionate about client care and dedicated to excellence, you have an appetite for learning and personal growth along with a willingness to support and champion others - you are a team player. With a keen eye for detail and possessing a 'can do / will do attitude', you instinctively take ownership and want to work with a firm that has the highest possible ethical standards and client expectations that fuel its reputation for being one of the most highly-regarded and respected boutique wealth management firms in the UK.

You will ideally hold or be working towards the level 4 Diploma and will have several years' experience in a financial or professional services firm. You want to 'get on' and join a family of outstanding professionals in one of the most exciting, progressive and energetic firms to work for with a fully-packed agenda for future growth.

### About us

We are an award-winning, boutique wealth management firm based in the centre of Nottingham, dealing with high net worth individuals. We are expert advisors with many years of shared knowledge and experience and we are growing.

True relationship is central to our thinking. When our clients entrust matters of the greatest personal importance, we need to ensure that our team are not just technically capable but also wise enough to understand.

### Our values

At Fiscal Engineers, we live our core values of:

- Making a Difference
- Care Deeply
- Get You
- Get the Job Done

### Our Key Behaviours

At Fiscal Engineers we do not assess performance against targets, instead we believe that we get the best results that we require from teamwork. Our key behaviours which we all commit to are:



- We always do the right thing
- We support and respect one another
- We embrace change
- We give our very best

#### Fiscal Engineers' benefits

- city centre location with car parking provision
- generous salary/bonus and profit share scheme
- group scheme benefits - pension scheme, death in service & income protection plan
- career and personal development pathways
- dedicated coaching and learning support
- wellbeing support services
- generous social budget and team away days
- agile and home working policies

To apply, please send a copy of your CV to [recruitment@fiscalengineers.com](mailto:recruitment@fiscalengineers.com).