

Senior Financial Planner

Job title: Senior Financial Planner
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 Senior Financial Planner to join our growing team. You will become the trusted adviser for a group of high-net-worth clients with complex financial needs, who expect an exceptional level of service. This will be met through regular review meetings and proactive contact with clients, their families and the other professionals who advise them. You will be working with a team of technicians and administrators who will support you in providing this service.

You will play a significant role in steadily growing our client group, primarily through building a network of professionals around you and providing a service which our clients are compelled to tell the people close to them about. You will help develop less experienced planners and contribute to the broader success of the firm through team interaction and project work.

About you

You are passionate about client care and dedicated to excellence, with an appetite for learning and personal growth, along with a willingness to support and champion others. You have a strong sense of integrity and a drive to always do the right thing for clients. You are hardworking, diligent and considered, with an exceptional ability for building genuine, long-term relationships with clients and always putting their interests first.

You possess character, competence and charisma, a keen eye for detail and a 'can do, will do attitude'. You instinctively take ownership and want to work with a firm that has the highest possible ethical standards, which fuel its reputation as one of the most highly-regarded and respected boutique wealth management firms in the UK.

You will hold or be working towards Chartered or CFP (Level 6/7) status and have 5 or more years' advisory experience in a financial planning 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 financial planners, 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

Our mantra– money. life. balance.

We always do the right thing

Working at Fiscal Engineers means we always do the right thing. As a team, we support, respect and care for each other. We believe in openness, honesty and giving everyone a voice. We work together



to embrace change and drive continued improvement, and we learn from one another so that we can keep growing.

This approach ensures we always do our very best for our clients, for our colleagues and for our business as a whole – all the while bearing in mind the following core values:

We care deeply

- we fully recognise our responsibilities to the people who place their trust in us
- we take enormous pride in our reputation for outstanding client service
- we thrive on a “can do” attitude
- we always strive to make a positive difference

We get you

- we build relationships that focus on people, not their money
- we believe sound judgement comes from viewing everything from a client perspective
- we appreciate the importance of listening closely and communicating effectively
- we pay attention to the bigger picture and the little details, because they both really matter

We get the job done

- we focus on devising and implementing the solutions our clients demand
- we make decisions based on data and evidence, not assumptions
- we draw on proven processes, shared wisdom and uncompromising standards to produce optimum outcomes
- we go the extra mile to add value, deliver on our promises and keep building on everything we have already achieved

Our Key Behaviours

At Fiscal Engineers, we do not assess performance against targets, instead we believe we get the best results through 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

- group benefits - pension, death in service, income protection and private medical insurance
- discretionary bonus
- city centre location with car parking provision
- agile and home working policies
- study leave and exam support
- mobile phone for work use
- career and personal development pathways
- dedicated coaching and learning support
- wellbeing support services
- generous social budget and team away days



Our recruitment process



To apply, please send a copy of your CV to recruitment@fiscalengineers.com