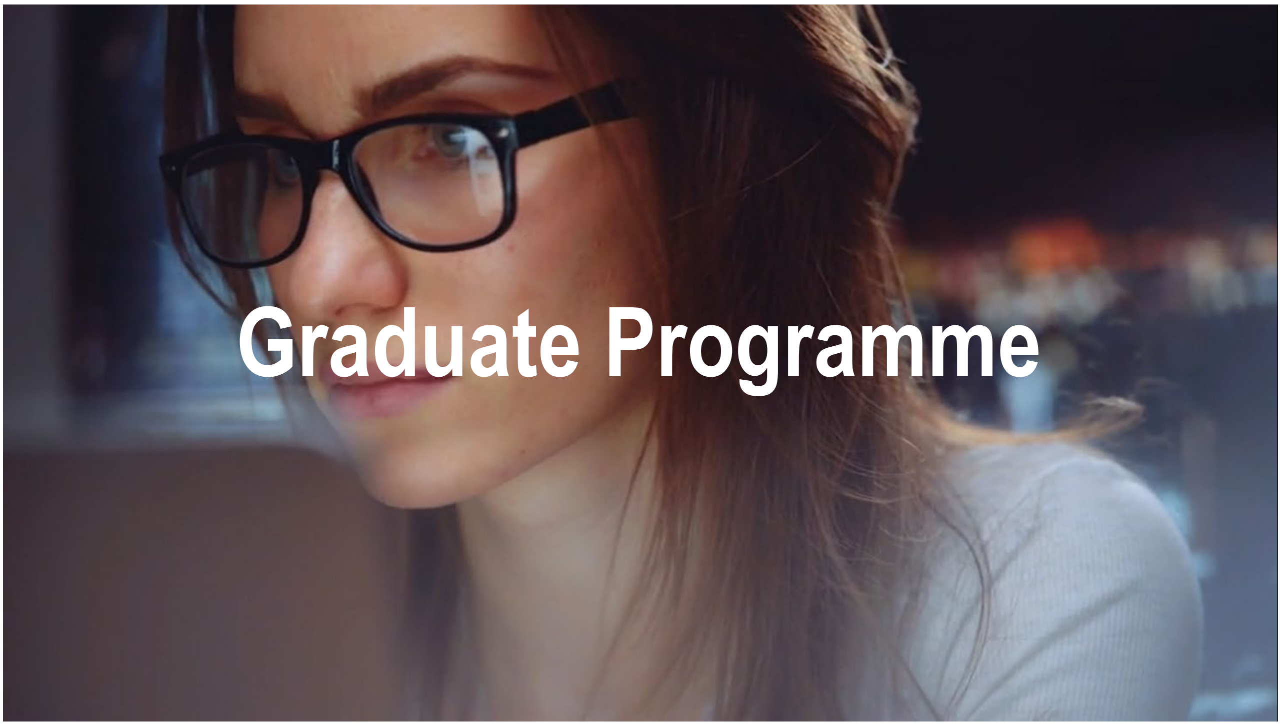

Version 1.0

Are you ready to start your career in financial services?

We believe wealth is more than money. Managed the right way, it should be a tool to help our clients achieve their goals and serve them at different stages of their life.

The opportunity has arisen for a recent graduate (2022 or 2023 cohort) to join a growing award-winning independent financial planning firm.

Join a friendly, professional, established, forward-thinking business in an open and collaborative working environment. We are supportive team that focuses on learning, development and achieving excellent client outcomes.

The right individual will possess the following skills and attributes:

- Excellent communication skills, both verbal and written.
- Highly organised, analytical and able to prioritise workloads.
- A positive 'can do' attitude to work efficiently with minimal supervision.
- Committed to providing a high-quality service to our clients.
- A desire to succeed and continually gain greater knowledge.

The Three Stages

Our Graduate Programme is split into three stages. These stages are aiming to build both your knowledge and soft skills over time, both on the job and through

The three stages are as follows:

Years 1 – 3: Financial Planning Assistant

- Studying toward the Diploma in Regulated Financial Planning.
- Develop a core understanding of our processes to ensure all work is undertaken in a compliant manner.
- Assisting our Financial Planners with administrative tasks, including the production of materials to assist with client reviews.
- Production of reports (both simple and complex) to document our advice to clients, both new and existing.

Years 3 – 4: Assistant Financial Planner OR Paraplanner

- Studying toward the Advanced Diploma in Financial Planning to achieve 'Chartered Status' after five year of employment.
- Sitting in on client meetings and providing meaningful contributions to further the clients relationship with the firm.
- In depth technical research surrounding investments, pensions and other financial products to assist our Financial Planners in providing suitable advice.
- Production of technical reports to confirm the suitability of financial plans.

Year 5 onward: Chartered Financial Planner OR Chartered Paraplanner

- Building up a client portfolio to provide you with a rewarding career.
- Networking with other professionals to build a stream of referrals.
- Becoming an in-house specialist in a financial planning area.
- Working toward further professional qualifications to cement your knowledge and demonstrate expertise.

Timescales are likely to vary, but we envisage a graduate to achieve Chartered Status within 5-years from beginning the programme.

This means that if you leave University at age 21 (or 22 if you took a gap year), it is perfectly feasible for you to obtain Chartered Status before your 30th birthday.

There are two pathways in our Graduate Programme. One pathway is to become a Financial Planner where your role is client-facing and providing advice directly, once your qualifications are achieved. The other pathway is to become a Paraplanner, where your role is behind-the-scenes focused on operations, research, analysis and producing reports.

Rewards

The role offers a competitive package, the details of which are as follows:

- Starting salary: £25,000. Regular increases based on performance, exam passes and time with the company.
- Full financial support for exams, training and professional membership.
- Discretionary bonus scheme (after probationary period) with the potential to earn the equivalent of a further 8% - 12% of basic salary
- 25 days holiday (plus public holidays). After two years service, this increases to 28 days.
- Workplace pension with a 5% employer contribution.
- Death-in-service scheme.
- Medical cash plan.

If you are interested in this very exciting opportunity, please email both a CV and covering note to enquiries@dartingtonwealth.co.uk and we will be in touch.