



Trainee Financial Adviser

Amicus Wealth is a well-established and respected brand in the financial services industry. Amicus specialises in all areas of financial planning. We try to break the typical mould of a financial advisory company by providing professional long-term client led solutions.

Role: *Trainee Financial Adviser – a role designed to give the chosen candidate the opportunity to build a substantial client base of high net worth individuals. The ultimate aim is to become a fully qualified financial adviser.*

Position Overview: *must be a highly motivated, articulate, passionate person who thrives whilst working in a fast-paced sales environment. The company is expanding rapidly and aims to provide a level of technical expertise and personal service to a client base of high net worth individuals.*

Job Functions

- Outbound telephone calls to schedule meetings and create client base
- Generate and research leads for prospective clients
- Provide an exceptional level of customer service to maintain and build on existing relationships
- Enhance and develop existing relationships in pursuit of new sales opportunities to increase business levels
- Training and exams to achieve Diploma level qualification and high knowledge levels and expertise in all areas of financial planning

Competency Requirements

- Passion – the desire and drive to work in a fast-paced sales environment in retail financial services industry.
- Ambition – Have the drive to build a business as quickly as possible
- Culture – be part of a culture which is centred around the following values: teamwork, profitability, knowledge, innovation, reputation and client-focus
- Success – help the company continue to grow and be one of the top companies in its network
- Development – looking to forge a successful career in financial services with a long-term focus
- Resilience – be able to face numerous challenges that are presented and continue to be focused and motivated
- Quality – Effective decision making in all circumstances will ensure a consistently high quality of service in all your dealings with clients and colleagues

- Integrity – Conduct all business with the utmost integrity to satisfy the requirements of compliance and regulatory bodies

Other Job Specific Experience/Technical Skills/Abilities

- Strong and flexible work ethic
- Service focused
- High quality interpersonal skills
- Winning mentality
- Ability to build and expand your own client base
- Conscientious and attention to detail
- Relevant IT knowledge (esp. Microsoft Office & Excel)

Benefits

- Uncapped earnings with the potential for top city levels
- Meritocracy – opportunity to get promoted up the company quickly
- Fun, enjoyable office environment

Starting Salary - £21,000

OTE in first year - £45,000

NOTE: This job description is not intended to be all-inclusive. Employees may perform other related duties to meet the ongoing needs of the organisation