

Our employee-owned, independent financial planning firm is looking its next trainee financial planner...

The Role Trainee Financial Planner

The Trainee Financial Planner is an administrative role to support the Financial Planners in the delivery of clients' financial plans, whilst learning and developing the skills needed to become an outstanding Financial Planner.

The candidate will have a passion for delivering an exceptional service to our clients, allowing them to live their very best lives through creativity and excellent financial planning.

Our mission is to get all our clients talking about their boost experience with their friends and family so they too want to join the boost family.

Challenge

Our internal desire to be as good as we can be means that constant personal growth and improvement is an expectation. You can expect to be challenged to improve everything you touch - and you can look forward to support from the boost team as you grow and flourish.

The working environment is rather special

Passers-by can be forgiven for confusing our lakeside office for a boutique spa. We have no doubt that you'll quickly settle into your new home. Our rural location means that parking is free and you'll have use of our electric car chargers.

If it's worth doing, we do it properly

If something will improve the day-to-day life of our team, we are not afraid to spend money on it. You can expect IT that fits your working needs and technology that 'just works'.

Building deeper relationships

We work as a team, learn from each other, and have fun. That camaraderie is also expended beyond work and projects into regular team events, marathon relays (optional!) and charity days.

We value your wellness

We don't like to see our team working evenings but that doesn't mean you have to leave... you can always pop next door to the boost gym. Our appointed Wellness Ambassadors are in charge of all things wellness... from activity challenges to home pamper kits. Your wellness is our priority.

The opportunity:

- To develop into our cashflow specialist with coaching, mentoring and oversight responsibilities as the business continues to grow.
- or
- To develop into a Financial Planner over time, where you will be coached, mentored and developed by our highly qualified and experienced team, to eventually lead your own clients to financial wellness.
- boost is dedicated to growing it's people, the investment and remuneration rewards are clearly laid out in personalised development pathways.

The responsibilities

- Analysing client data and working within a team to prepare client financial plans.
- Following our onboarding process to ensure all clients' first experience of boost is exemplary.
- Ensuring that all regulatory and compliance standards are met.
- Liaising with product providers and other relevant third parties.
- Ensuring client needs are met to an exceptional standard, including:
 - All matters are followed through promptly to the appropriate conclusion;
 - Focus on improving all clients' outcomes at every opportunity;
 - Working within the parameters of the boost processes and constantly looking for ways in which to improve efficiency;
 - Attending client meetings.
- Continual Professional Development.
- Keeping up to date with legislative and industry changes which affect boost and our clients.
- Keeping internal briefing notes up to date, with the support of the Financial Planners and other technical team members.
- Working with the rest of the team to ensure boost meets its objectives.

The 'must haves'

The successful candidate will have:-

- Excellent communication, spelling, grammar, accuracy.
- Experience of working within financial planning.
- At least 18 months experience of working in financial services, ideally financial planning.
- The drive to seek opportunities and highlight these to the planner.
- Motivation and excellent time management skills.
- Ability to think outside the box, for the right outcome!
- Experience on working with Cashflow modelling tools, ideally Truth

The 'nice to haves'

- Experience of using cashflow tools, ideally Truth.
- Experience of Apple hardware & software.
- Experience of Intelliflo Office CRM.
- Good protection knowledge.

The benefits

- Competitive salary and pension contribution.
- Competitive productivity bonus, in which all team members are included.
- Group Death in Service & Private Medical Insurance.
- 22 days holiday, increasing annually, up to 27 days upon 5 years service + bank holidays & Christmas days.

The non-monetary rewards

- All professional memberships, relevant conferences, studies and exams fully-funded by boost.
- Coaching and mentoring from our 5 (and growing!) Certified Financial Planners throughout your journey to Financial Planner.
- Monthly internal training sessions to ensure the continued development of our team.
- Healthy team social and wellness budgets for the whole team to enjoy.

About boost

We are an independent employee-owned firm of Certified Financial Planners based in the Bedfordshire countryside in our beautiful, purpose-built, eco, lakeside office, close to Milton Keynes and M1 Junction 13.

The move to employee-ownership in October 2024, shows our dedication to our clients and our team with boost becoming infinite.

We are a multi-award winning CISI Accredited Firm and hold British Standards certifications BS8577 & BS8543, along with all financial planners certified to ISO22222.

Our qualifications, accreditations and awards show our dedication to investment in our people and processes for the benefit of our fans, the clients that are the wider boost community.

If there is a need to relocate for the role, some of our wonderful fans (clients) have rooms to rent in their homes at affordable prices. Based minutes from the office in the countryside, but close to the hustle of Central Milton Keynes.

Core values

boost prides itself on the service it delivers to its clients. With excellence at the heart of all we do, we constantly strive to improve our documents, systems and processes to achieve greater outcomes for our clients.

With a desire to see our clients live their very best lives, the successful candidate will have a passion for excellent outcomes and doing the right thing.

Common sense is applied to all we do, and we believe in keeping things elegantly simple rather than adding unneeded complexities.

Within the boost team, getting on together is vital and communicating effectively, clearly and concisely is crucial, enabling the team to run smoothly.

boost is incredibly open about the objectives of the business. We believe accountability is the best way to achieve objectives and goals, so we love to hear about our teams' personal goals, support them, and celebrate with them when they are achieved!

Contact jennie@boost.financial to learn more and apply

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