

Gower Financial Services Limited – Job Description	
Role:	Trainee Financial Planner
Role Outline:	The Trainee Financial Planner role is based within the Gower administration team, supporting the existing team of Financial Planners to learn how the planning and advice process works. This will involve attending meetings with Financial Planners, assisting in writing advice reports, and supporting the administration team to ensure the smooth running of the business. In addition, you will study for the professional Financial Planning qualification as part of the Gower Career pathway (see below). The initial qualification process is over two years, at which point the role would transition into the qualified Financial Planner role.
Reporting To:	Head of Financial Planning
Key Responsibilities	
The role:	<p>Trainee Financial Planner –</p> <ul style="list-style-type: none"> • Training program to become a Chartered Financial Planner as part of the Gower Career pathway, a four-year program of exams from the Personal Finance Society (PFS), The first stage of this being the Diploma in Financial Planning (2 years). • Shadow existing financial planners in client meetings, assisting with meeting preparation work. • Support the financial planners and senior administrators with general administration as required, provide cover for the administration team. • Assist with marketing campaigns; update the company website, social media and work with the Head of Financial Planning on business development and marketing initiatives.
Education, Experience & Skills	<p>Education:</p> <ul style="list-style-type: none"> • GCSE Maths & English • 3 A Level of equivalent qualification • A degree is preferable, but not essential <p>Experience:</p> <ul style="list-style-type: none"> • Not essential, but an understanding of personal financial concepts an advantage • Some Financial services experience would be an advantage, but is not essential

	<p>Skills:</p> <ul style="list-style-type: none"> You'll need to be friendly, personable, able to demonstrate empathy towards others, and have strong communication skills.
Remuneration	A competitive remuneration package would be provided to the candidate based on their previous experience and role. Gower offer a full benefits package, such as a company pension, death in service insurance, health insurance and a discretionary bonus.
How to apply:	<p>For more information or to ask a question about this role, please contact Paul McCormick at Gower: paul.mccormick@gower.gg</p> <p>To apply, please submit your CV and contact details to careers@gower.gg</p>