

Job Description – Financial Planner

Why work for Monenti Partners

Monenti Partners was established with a clear mission. We aim and aspire to set the benchmark for the quality of financial planning we provide our clients, and the positive outcomes we deliver for them as a result.

Our mission is to take our clients from Financial Uncertainty to Financial Freedom.

Our team members tell us a key element to our success in achieving our mission is our approach to collaboration both internally and with our clients. We put our clients Lifestyle Objectives at the centre of all of the work we do and do not simply transact the financial advice that a client requires.

We are a growing team with aspirational objectives, providing exciting career progression. We are looking for a Financial Planner who shares our values and wants to continue on our process orientated approach to improving both our clients and our own individual outcomes. We are growing fast, and are looking for a Financial Planner than can assist with our current and future planning capacity as we acquire further businesses.

Watch the below videos to find out more.

[What our Team Say](#)

[Monenti Partners - An Introduction](#)

[Our Process](#)

A Day in the Life of an Monenti Partners Financial Planner

- **Planning Meetings** – For 50-60 client families.
 - **Pre Meeting** – Collect and prepare documentation for meetings (Client information, Agenda's, Investment Report's and Risk Review's).
 - **Post Meeting** – Prepare and share financial planning reports with clients.
- **Financial Advice** – Prepare suitability letters for advice cases in line with Monenti Partners standards and processes.
- **Compliance** – Work with and adhere to both FCA and Monenti Partners guidelines and processes.
- **Record** – Collate, update and manage client data within our CRM system.
- **Growth** – Be available and willing to take further handovers and grow via both holistic advice and new clients within our target market.



- **CPD & Knowledge** – Keep an up to date CPD log in line with the companies requirements. Where appropriate achieve level 6 status.
- **Shadowing** – Shadow and assist directors in high net worth & complex planning meetings.
- **Utilise and Improve Processes** – Play a key role in both utilising and improving our processes and workflows.

About you:

You will need:

- Whole of Market IFA financial services background, having provided financial planning and financial advice to individuals and client families
- **Experience:** End to end function of planning and advice including meeting preparation and suitability report writing, Level 4 and SPS in place, up to date CPD record, has experience of servicing and growing a client bank, has dealt with clients within our target market, financial planning and cash flow forecasting centred.
- Outstanding attention to detail.
- Able to utilise and improve processes.
- Make effective individual decisions within a team environment.

Technology Stack (Knowledge Preferred)

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|----------------------|--------------|
| • Intelligent Office | • Genovo |
| • Dynamic Planner | • Office 365 |
| • Voyant | |

MP Values

- Integrity
- Diligence
- Commitment
- Energy
- Curiosity

Main Product Providers & Platforms

- | | |
|-------------------------------|-------------------------|
| • Fidelity Adviser Solutions | • Novia |
| • Quilter Investment Platform | • Quilter International |

Salary & Benefits:

Salary: Competitive

Bonus: Discretionary

Pension: Yes

Private Medical Insurance: Yes

Life Cover: Yes

Other Benefits: Exam Support, Cycle to Work Scheme

Hours: Permanent, full time, flexible working