Financial Planner (Dundee/Edinburgh/Aberdeen and Hybrid)

Thorntons Wealth offers expert advice on all aspects of financial and wealth planning to our wide base of clients across Scotland. We're part of the Thorntons Investments family, established in 1995, and we're proud of our heritage having retained our HQ in Dundee, with offices also in Edinburgh and Aberdeen.

Our Financial Planning advisory team is growing, and we are looking for experienced and qualified Financial Planners, who will provide the highest standard of financial planning advice to both existing and new clients.

Main Responsibilities:

- Maintain and develop existing client relationships to ensure existing business is secure and new business opportunities are maximised.
- Generate new business by introducing the Thorntons Wealth proposition to potential new clients.
- Ensure new leads are dealt with in a timely manner to maximise financial planning opportunities.
- Develop external business connections to increase awareness of the Thorntons Wealth brand.
- Conduct regular client meetings to Thorntons Wealth service standards.
- Maintain up to date technical knowledge of all relevant financial planning matters.
- Comply with the Thorntons Wealth Training & Competence scheme, Financial Conduct Authority regulations and UK regulation at all times.

Person Specification

- Diploma qualified as a minimum, Chartered Financial Planner is preferable.
- Demonstrable track record of success.
- Embracing IT – we deliver a digital service to our clients using a variety of technology including our back-office system, online client portal as well as a range of software packages to enable us to provide a streamlined service to our clients. Experience in hosting video calls, Curo, Cashcalc, Dynamic Planner and Nucleus would be beneficial.
- Understands the importance of client service, ensuring all clients of Thorntons Wealth receive the highest standard of service.
- Experience of working in a fee-based environment.
- Adaptable and organised with a commercial approach.
- Team player with excellent communication skills both oral and written.
- Ability to proactively manage existing client relationships and to develop new relationships.

- Ability to act as a positive role model for Thorntons Wealth within the business and the wider community.
- Must demonstrate an understanding of risk management issues.
- Exercises good judgement and able to work without close supervision.
- Whilst a transferable client bank is not essential, any clients that are transferable will be made to feel most welcome.