

Johnston Carmichael Wealth is an associate company of Johnston Carmichael. We are a team of Financial Planners who operate across 11 offices in Scotland and are capable of taking care of the most important financial planning needs of private and corporate clients.

We are looking for an experienced Financial Planner to join our Edinburgh office who will rise to the challenge of helping our business continue to grow and for the right candidate the opportunity to lead the team in the central belt.

Financial Planner

Job Type: Permanent

Hours of Work: Negotiable


Location: Edinburgh

Salary details: Competitive

Job Purpose: To work with the Management Team, Financial Planners and Technical Team to ensure we deliver the best service to our client base. This role will focus on building close relationships, providing ongoing service and advice to an existing diverse client base.

The successful candidate will be responsible for:

- Financial services advice, providing knowledge and guidance, always giving a first-class complete financial services advice to their client list
- Provide financial advice to clients within compliance guidelines by the Regulator and the company
- Consult appropriately on areas of particular risk to the company, e.g. structured products, VCTs, EIS, other specialist tax products
- Keep up to date with new product, complex financial services matters and technical or legislative changes within the marketplace
- Maintain performance standards in accordance with those outlined in the Key Performance Indicators section of the T&C Procedures
- Provide technical backup to the company on general financial services matters
- Provide a very high standard of knowledge regarding complex financial services matters, and keep this knowledge up to date
- Contribute towards Firms business targets by ensuring personal objectives and targets are met
- Maintain Competent Status as defined by the Regulator and the company
- Work towards leading and managing workload of Financial Planners



You will be a practising Financial Planner, with a minimum qualification of the Diploma in Financial Planning, or equivalent but preferably Chartered Status.

You will have excellent interpersonal and technical skills and be committed to delivering first class advice and service in a strictly compliant manner to existing and new clients.

You must be able to demonstrate relevant experience in financial planning, product provision and business development.

If you are interested in applying for the above position please send your CV with a covering letter to recruitment@jcca.co.uk by the closing date.

Date advert posted: 1st Aug 2018

