



GILSON GRAY

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Financial Adviser

Department: Financial Management

Location: Dundee

Contract type: Full-time

About Gilson Gray

Gilson Gray's Financial Management team is part of Gilson Gray's continually growing organisation. Gilson Gray LLP is a comprehensive law firm, offering expert legal, property, and financial services. We support clients throughout their entire lifetime. The Financial Management team have decades of experience in Wealth Management and can advise on every Financial related matter.

Based in Edinburgh, Glasgow, Aberdeen, Dundee, Forfar, North Berwick, Lincoln, and London we focus on ensuring we provide the highest level of advice and on-going service to our clients. We are ambitious and have significantly grown the team over the course of the last year. We pride ourselves in looking after our clients personally and providing the utmost standard of service.

This role would be based in our Dundee office.

Our Team

We are looking to hire a highly driven Financial Adviser to join one of our successful Financial Management team in Dundee.

We are an enthusiastic team that support each other in order to achieve a great working environment. We value each other's expertise and opinion and pride ourselves in offering an inclusive, enjoyable, and motivating place to work.

The Role

We are looking to further strengthen our current team with the appointment of an experienced candidate.

As a Financial Adviser at Gilson Gray you'll be responsible for:

- Contacting existing and new clients to offer financial planning services
- Conducting in-depth reviews of clients' financial circumstances, current provision, and future aims
- Research and analysing information with which to design financial strategies and prepare proposals to best suit individual clients' requirements
- Completing analyses of clients' attitude to risk in accordance with their financial planning decisions
- Reviewing and responding to clients' changing needs and financial circumstances
- Providing clients with information on new and existing products and services
- Communicating with other relevant professionals in relation to clients' circumstances
- Keeping up to date with legal, taxation, and regulatory legislation as appropriate and maintaining professional and technical knowledge of St. James's Place products and services
- Liaising with clients in relation to changes to legislation that may affect their savings, investments, or plans
- Meeting the regulatory aspects of the role
- Participating in monthly marketing meetings and strategies for business development



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- Reasonable tasks/Adhoc project work that may be required from time to time
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Required Knowledge and Experience

- Level 4 qualified
- Competent Adviser Status (CAS)
- Use of Financial Analytics

Our ideal candidate would also

- Excellent communication, interpersonal, and listening skills
- Ability to explain complex information simply and clearly
- Ability to network and quickly establish trusted client relationships
- Research and analytical skills
- Exceptional client servicing skills
- Ability to work in a team
- Self-motivated with good time management skills
- Highly organised - maintaining client records, technical, and compliance requirements
- Good level of numeracy and IT skills
- Flexible approach to work
- Sound decision-making skills
- Discretion and an understanding of the need for client confidentiality
- Committed to continuous technical and professional development, ensuring that knowledge and skills remain current
- Ethical and professional approach to work

Benefits

- A competitive salary with annual review and potential bonus award depending upon performance
- 32 days holiday a year (includes bank holidays)
- Birthday day off
- 3 x Death in Service benefits
- Membership of an occupational pension scheme
- Wellbeing initiatives and opportunity to access online Health Provider

This is an exciting time to join us. Think this is for you?

Get in touch for a confidential chat about how you can become part of the team at recruitment@gilsongray.co.uk



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