



GILSON GRAY

LAW • PROPERTY • FINANCE

Financial Adviser

Department: Financial Management

Location:

Edinburgh / Glasgow / Dundee / Aberdeen /
North Berwick

Contract type: Full-Time

About Gilson Gray

Gilson Gray's Financial Management team are part of Gilson Gray's continually growing organisation. Gilson Gray Financial Management Ltd are a comprehensive wealth management practice as part of the wider Gilson Gray group who also offer expert legal advice, estate agency services and lettings. We support clients throughout their entire lifetime. The Financial Management team has decades of experience in advising clients throughout all stages of life and can advise on all financial investments.

Based in Edinburgh, Glasgow, Aberdeen, Dundee, North Berwick and Lincoln 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 upmost standard of service.

This role can be based from either Edinburgh, Glasgow, Dundee, Aberdeen or North Berwick office.

Our Team

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

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:

- Talking to clients to determine their expenses, income, insurance coverage, financial objectives, tax status, risk tolerance, or other information needed to develop a financial plan
- Advising on strategies for clients in insurance coverage, investment planning, cash management, and other areas to help them reach financial objectives
- Reviewing client accounts and plans on a regular basis to understand if life or economic changes, situational concerns, or financial performance necessitate changes in their plan
- Preparing or interpreting financial document summaries, investment performance reports, and income projections for clients
- Building and maintaining your client base
- Providing clients with advice and guidance on lending, mortgage, investment, and insurance products
- Establishing client's future requirements and tailoring advice and services to meet these needs
- Giving sound advice on the best options available to safeguard client financial assets



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Required Knowledge and Experience

- Diploma Level 4 qualified
- 1 years' experience giving holistic financial advice

Our ideal candidate would also

- A professional attitude to work that helps us maintain a supportive culture within the business
- Capability of working to a target efficiently, maximising and activating the potential of every lead
- Looking for your next logical step in your career and can demonstrate that you are very proactive, dynamic and ambitious
- A sufficient self- starter who can maximise the GGFM support structure behind you to reach your full potential
- A focus on best practice, strong team spirit, positive customer outcomes and experience.
- The ability to engage successfully with new leads and new customers efficiently and proactively

How Gilson Gray Financial Management Will Support You:

- Bespoke support to smooth your transition into our business
- Existing client servicing opportunities with both private and corporate clients
- Access to our distinctive approach to investment management
- The St. James's Place Advice Guarantee*
- Specialist advice and technical support
- Exceptional marketing support, including client events
- Support in working towards Chartered status
- The power of the St. James's Place brand
- Streamlined administration allowing more face-to-face time with clients

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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