



GILSON GRAY

LAW • PROPERTY • FINANCE

Trainee Paraplanner

Department: Financial Management

Location: Dundee, Edinburgh, or Glasgow

Contract type: Full-time

About Gilson Gray

Gilson Gray Financial Management Ltd is a comprehensive Wealth Management organisation that also connects with the wider Gilson Gray group who offer in addition; expert legal advice, and property services. We support clients throughout their entire lifetime. The Financial Management team have decades of experience in the market and can advise on financial plans and products for anyone at any stage of life.

Based in Edinburgh, Glasgow, Aberdeen, Dundee, North Berwick and Lincoln we focus on ensuring we provide the highest level of advice and ongoing service to our clients. We pride ourselves in looking after our clients personally and providing the highest standard of service.

Our Team

We are looking to hire a highly driven Trainee Paraplanner to join our successful Financial Management team in Dundee, Edinburgh, or Glasgow.

We are an enthusiastic team supporting each other 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 a Trainee Paraplanner. As a Trainee Paraplanner at Gilson Gray Financial Management you'll be responsible for:

- To assimilate and segregate information gathered by the Adviser on the Confidential Client Review
- To liaise with the Adviser & Client as appropriate to fill any information gaps
- Complete suitability reports and collate meeting packs with all regulatory documents to allow the Adviser to present business
- To gather ceding scheme information from third parties
- To work within and stay up to date with template changes and advice framework
- To ensure that 99% quality of submission is achieved to support our Practice Quality Score (full training will be provided)
- To work within a regulated environment and stay abreast of legislative changes
- Liaise with Head Office admin centres as required
- Ensure you use St. James's Place end to end Guides for business submission



www.gilsongray.co.uk

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Required Knowledge and Experience

- Previous experience of working in a Financial Services role
- Able to prove ability to pass RO exams
- Working towards Diploma qualification preferential
- Able to pass regular internal testing of knowledge
- Take pride in producing high quality, accurate and timely information
- Demonstrate excellent verbal and written communication skills
- Previous CPD record of achievement
- Considering Chartered FP
- Experience of using client management systems
- Broad experience of Microsoft Office, advanced Excel and experience of using Salesforce

Our ideal candidate would also

- Have excellent social and interpersonal skills dealing with clients
- Have excellent communication, organisational and attention to detail skills
- Problem solving and analytical skills
- Ability to work as part of a large team and contribute to the overall business aims
- Ensure that your actions are consistent with the culture of the business.
- Consistently strive to be the best you can be.

Benefits

- A competitive salary with annual review and potential bonus award depending upon performance
- 32 days holiday a year (inc. Bank Holidays)
- Birthday off
- 3 x Death in Service Benefit
- Hybrid Working
- 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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