GILSON GRAY

LAW • PROPERTY • FINANCE

Financial Adviser

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Job Title: Financial Adviser
Location: Edinburgh/Glasgow/Dundee/North Berwick
Minimum Requirements: Level 4 Diploma in Regulated Financial Planning

Are you a qualified advice professional looking to progress your career?

Since establishing in 2014, Gilson Gray Financial Management LLP is highly regarded as one of the fastest growing companies in Scotland. The company is a Senior Partner Practice of St. James's Place Wealth Management and offers holistic wealth management advice to private and corporate clients across the UK.

Operating across the central belt of Scotland, Gilson Gray has further expansion plans and is looking for Financial Advisers to join us to provide holistic financial planning advice to private and corporate clients based across the UK. The business is seeking a highly motivated, ambitious, self-starter to join us in building quality, long-term relationships with clients.

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

ADDITIONAL MARKETING & ADMINISTRATION SUPPORT:

You will receive support and training to build your own network of introducer relationships. If you need help with lead generation, we can give you the sales and marketing support you need, with opportunities to access a portion our existing client bank.

You will have the benefit of working with well-trained people using proven processes and the latest technology. We will support you to ensure that client cases are processed efficiently and effectively. This will enable you to focus your time on generating face-to-face activity with clients, without being burdened with excessive administration.

What we are looking for:

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

What will you be doing?

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 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