

**Job Title: Trainee Financial Adviser**

Amicus Wealth is a new and exciting brand in the financial services industry. With offices based in the heart of the City just behind the Bank of England. Amicus Wealth has an established client base comprised of city-based professionals, business owners and sports people.

The company was formed by 3 people with over 25 years' experience in the wealth management industry. Amicus is made up of over 20 advisers who specialise in all areas of financial planning. We try to break the typical mould of a financial advisory company by providing professional long-term client led solutions.

**Role:** *Trainee Financial Adviser – a role designed to give the chosen candidate the opportunity to build a substantial client base of high net worth individuals. The ultimate aim is to become a fully qualified financial adviser with the option to build your own sales team in the future.*

**Position Overview:** *must be a highly motivated, articulate, passionate person who thrives whilst working in a fast paced sales team. The team is expanding rapidly and they aim to provide a level of technical expertise and personal service to a client base of high net worth individuals.*

**Essential Job Functions**

- Outbound telephone calls to schedule meetings and create client base
- Generate and research leads for prospective clients
- Provide an exceptional level of customer service to schedule meetings as well as maintaining and building on existing relationships
- Enhance and develop existing relationships in pursuit of new sales opportunities to increase business levels
- Focus on delivering long term relationships that deliver
- Training and exams to achieve Diploma level qualifications and high knowledge levels
- Learning of paperwork processes to complete sales to a compliant level

**Non-essential Job Functions**

- Work as part of team with an emphasis on team targets as well as individual targets
- Constantly improve product and industry knowledge

**Competency Requirements**

- Passion – the desire and drive to work in a fast paced sales environment in retail financial services industry.

- Ambition – Have the drive to build a business as quickly as possible by speaking to prospective clients and scheduling meetings
- Brand - Help to promote the brand of a growing, young, dynamic financial services company looking to establish itself as one of the leading companies in the City of London in this industry
- Culture – be part of a culture which is centred around the following values: teamwork, profitability, knowledge, innovation, reputation and client-focus
- Success – help the company continue to grow and be one of the top companies in its network
- Development – looking to forge a successful career in financial services with a long-term focus
- Work Ethic – have the necessary work ethic and hard-working attitude required to be successful in this sort of environment. Go beyond
- Resilience – be able to face numerous challenges that are posed by a fast-paced sales environment and continue to be focused and motivated
- Independence – be able to prosper from the independence that a self-employed environment gives to you and be able to push yourself further than a typical employed role
- Quality – Effective decision making in all circumstances will ensure a consistently high quality of service in all your dealings with clients and colleagues
- Integrity – Conduct all business with the utmost integrity to satisfy the requirements of compliance and regulatory bodies
- Targets – 100% is the only target that you should aim for; both individually and as a team

#### **Other Job Specific Experience/Technical Skills/Abilities**

- Sales experience if applicable
- Strong and flexible work ethic
- Service focused
- High quality interpersonal skills
- Winning mentality
- Ability to build and expand your own client base
- Conscientious and attention to detail
- Relevant IT knowledge (esp. Microsoft Office & Excel)

#### **Benefits**

- Uncapped earnings with the potential for top city levels
- Company share scheme
- Fun, enjoyable office environment with unlimited golf mat and beer fridge

<p>NOTE: This job description is not intended to be all-inclusive. Employees may perform other related duties to meet the ongoing needs of the organisation</p>
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