**BTM Wealth Management Ltd**

**PSS – Job Specification**

This is a fantastic opportunity for you to learn, develop and become heavily involved with the team in Spinningfields, Manchester. If successful, you will be involved in supporting the Paraplanning team in delivering the best possible service for our clients. You will be working closely alongside the Financial Adviser and Paraplanning team, allowing you to quickly develop your professional skills and experience within the industry. Putting your expertise to the test, there is also incredible scope in this role to progress quickly within the practice.

At BTM Wealth Management Ltd (Partner Practice of St. James’s Place Wealth Management Plc), we are committed to building long-lasting relationships with our clients and their families, in order to provide financial security and ongoing support. Time is taken to understand clients' financial aims and objectives to ensure our advice is personalised to suit their needs. Our objective is to help our clients build, grow, protect and preserve their wealth.

We are affiliated to St. James's Place Wealth Management Plc, a leading FTSE 100 wealth management specialist with over £153bn of client funds under management, which provides us with backing and support for our services.

**Key Responsibilities:**

As a PSS (Partner Support Specialist) your key responsibilities would be as follows:

* Working with the Paraplanner - making sure that the Paraplanner has all of the correct and relevant information that they need in order to process the case.
* Valuation Sheets - detailing a client or prospect's financial estate.
* Proposal Letters – formulating and outlining the potential recommendations to present to the client or prospect.
* Salesforce - detailing clients/prospect's details onto the CRM system.
* FE Analytics - inputting investment data into an online system to benchmark investment portfolios against one another.
* iBusiness – adding client information to our in-house CRM system.
* Getting documents ready to post to clients/prospects – printing out relevant regulatory documents and posting them out to clients/prospects.
* LOA’s (Letter of Authority) – filling out client/prospects details and sending them to relevant pension/investment/protection providers.
* Working with the Partner to shape the advice – helping the partner work through the documents that support the advice and having oversight of how the process works.
* Calling pension/investment providers – chasing any requested information and making sure that the information we have requested is being sent out to us and that the pension/investment provider sends out the correct information.
* Voyant client cash flow modelling - assessing the impact of investments over the long term.

**About you:**

* No previous experience is required.
* Achieved a minimum of a 2:1 in your degree.
* A strong drive to work within the financial services industry.
* Highly motivated and proactive individual.
* Innovative – we welcome innovative ideas to help improve our advice process and speed up internal processes.
* Work cooperatively and effectively with colleagues.
* A keen eye for detail.

**Rewards:**

* Great working environment.
* Help shape the way we deliver advice.
* Opportunity to progress quickly within the practice.

**How to Apply:**

* Just email us your CV and a short covering letter explaining why you would like the position and why you would be a good fit.

[martin.bull@sjpp.co.uk](mailto:martin.bull@sjpp.co.uk).

Job type: Full-time