

Job Role: Paraplanner

Location: Wolverhampton and Newcastle Upon Tyne (Hybrid)

As a Paraplanner at Miton, you will support our financial planners by conducting research, preparing reports, and ensuring that our clients receive the best advice based on thorough analysis. This role is ideal for those with a keen eye for detail and a strong understanding of financial products, taxation and regulations.

Key Responsibilities:

- Prepare detailed financial reports and recommendations.
- Conduct research on financial products and market trends.
- Assist financial planners in developing client strategies.
- Ensure compliance with regulatory requirements.

Qualifications:

- Minimum Diploma in Financial Planning or equivalent, and wishing to aspire to be Chartered and a CFP.
- Experience in a paraplanning or similar role, use of Cashflow planning tools, and CRM systems.
- Strong analytical and research skills.
- Knowledge of financial products and regulatory environment.

How to Apply:

If you are interested in any of the positions listed above, please send your CV and a cover letter explaining why you would like to join us and telling us about yourself to careers@mitonoptimal.co.uk