CareersWanted

In association with e-volve consulting

A winner all year round!

The Certified Financial Planner (CFP) Licence is one of the most versatile of qualifications. Not only is it the one qualification recognised abroad, but it is also of great importance and extremely useful for many people, not just financial planners. For example, the CFP license may benefit advisers who participate in a market which is particularly seasonal, like Tax Advisers. Half of the year is spent dealing with their client's tax affairs at the very crucial time, end of the tax year. The work involved can take up to six months with all the detailed analysis involved, examining of accounts, investigations etc. So, what if the rest of the year the Tax Adviser could be the client's financial planner and use the other six months of the year to review their wider personal and business affairs, with the added benefit of knowing the ins and outs of their tax position? Not only would the client not need or want to look elsewhere for a financial planner, but the Tax Adviser would have cemented the relationship even further.

The Tax Adviser can now approach the client about retainer their ongoing services on a monthly retaining basis and charge where necessary for additional time spent, resources and advice given throughout the year.

The client is happy as their needs are taken care of on all aspects of finances and the Tax Adviser is happy as they can concentrate on building on the existing relationships they have. Therefore there is no need for the Tax Adviser to spend money on marketing for new clients, which means a win, win situation all round.

Managing Director
Justina Williams

Research Consultant
Caroline Anderson

e-volve consulting: a trusted service

Justina Williams has worked in Financial Services and Financial Services recruitment for over nine years. She set up e-volve in February 2004 to offer a high quality recruitment service to both the business and the individual.

Based in the heart of London's City, e-volve is very well connected and all new business partners are gained through referrals, networking and headhunting. Justina is the lead consultant responsible for managing relationships, and with two Certified Financial Planner licensees as co-directors of e-volve, there is a clear understanding of the financial planning profession. A team of qualified and experienced researchers assist Justina with finding the best people.

e-volve treat their clients as partners and their candidates as individuals. The business is designed to help financial planning practices get the best from their personnel and for financial planners to get the best from their careers. e-volve aims to build long-standing professional relationships, where they are seen as a trustworthy sounding board and the preferred choice.

If you are a financial planner or planning business and would like to find out how e-volve's services could help you, please visit: www.e-volveconsulting.co.uk or contact: Justina Williams,
T: 020 7643 2219, E: justina.williams@e-volveconsulting.co.uk

A COMPLIMENTARY SERVICE AVAILABLE TO IFP MEMBERS ONLY - THE OPPORTUNITY TO POST DETAILS CONCERNING HELP OR CAREERS WANTED. FOR MORE INFORMATION CALL 0117 945 2470

Paraplanner - Buckinghamshire
County Finanical Limited based in Beaconsfield, a christian financial planning company (fee-based) require a full-time paraplanner to work within the team alongside a CFP. Duties include preparing cashflow analyses, porftolio valuations, pension valuations, annuity comparisons, researching products, drafting suitability letters, meeting with clients. Qualifications: Cert FP, experience of 1st Software, Microsoft Office, Aequos, Exchange, etc. Salary dependent on qualifications and experience.
Contact Peter Green, Managing Director, 01494 675127 or email info@county.org.uk

To submit an advertisement for 'Careers Wanted' send details (no more than 75 words) plus a contact email address to katherinel@financialplanning.org.uk
Important note: the IFP is offering this service to Members as a form of 'post box' only. Publication of details within the Financial Planner is not an endorsement by the IFP and candidate details have not been verified in advance. The Institute reserves the right to not publish information submitted for publication.