

**PERSON SPECIFICATION**

JOB TITLE: Paraplanner  
 BUSINESS GROUP: Financial Services  
 LOCATION: Fareham

Criteria	Essential	Desirable
<b>Skills/Qualifications</b>	<p><u>Qualifications</u>            Level 4 Diploma as a minimum and ideally working towards Chartered or further.</p> <p><u>Skills</u></p> <ul style="list-style-type: none"> <li>• Accurate and precise</li> <li>• Absolute attention to detail with figures</li> <li>• Attention to detail of protocol</li> <li>• Needs to be extremely well organised and tidy</li> <li>• Able to run a tight diary schedule</li> <li>• Able to work within a team environment</li> <li>• Able to work under pressure</li> <li>• Needs to be flexible</li> <li>• Excellent report writing and written/verbal communication skills</li> </ul>	
<b>Knowledge</b>	<ul style="list-style-type: none"> <li>• Good understanding of compliance</li> </ul>	
<b>Experience</b>	<ul style="list-style-type: none"> <li>• Paraplanning within an IFA</li> <li>• Case Management</li> </ul>	
<b>Presentation</b>	<ul style="list-style-type: none"> <li>• Presentable appearance</li> <li>• Good telephone manner</li> </ul>	
<b>Attributes</b>	<p>A “Warner Goodman person” is one who shows at all times:-</p> <ol style="list-style-type: none"> <li>1. The utmost honesty and integrity</li> <li>2. A “can do” positive attitude</li> <li>3. A willingness to help others and to go the extra mile</li> <li>4. An enthusiasm for the firm, its people and its clients</li> <li>5. A sense of pride and loyalty towards the firm and its people</li> <li>6. A flexible attitude towards</li> </ol>	

	<p>their job description</p> <ol style="list-style-type: none"><li>7. A passion for delighting our clients</li><li>8. A desire to communicate with our clients and our people in a polite, friendly, approachable and pragmatic manner</li><li>9. An ability to deliver fees and focus on individual profitability</li><li>10. A desire to seek continual innovation and improvement</li></ol>	
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