

Employed Adviser | Legal and Medical Investments

Who are we?

We are an established IFA practice trading for over 25 years within the medical and dental space, advising predominantly Doctors and Dentists both in and outside of the NHS. Our USP compared to a high street adviser is that we understand Doctors' and Dentists' career paths, payslips and general way of working. This helps us to provide a more robust advice process to these clients.

Why are we looking for new employed advisers?

With a vast client bank belonging to over 20 self-employed advisers who have all been advising for a number of years, we generate daily new enquiries and with a well-known brand within our sector, we also receive a lot of referrals. We are looking to employ advisers to take on those referrals and turn them into new business. In addition to this, a number of our existing advisers have plans to retire in the next few years presenting more opportunities for new advisers to take on their clients.

What sort of individual are we looking to employ?

Someone who is Level 4 diploma qualified including mortgage qualification.

The right person needs to be a self-starter. We generate leads but it is up to the individual to convert those into fact-finding meetings, presentation meetings and ultimately new business. We advise on all areas of financial planning from mortgages and protection to investment and pensions.

Previous sales experience and knowledge of the sales process.

You need to be comfortable and disciplined enough to work from home, we don't operate offices. Although we are home/remote-based we also get together 4 times a year for CPD purposes and to share best practice. These meetings tend to happen in the west country so be prepared to travel to those.

We very much encourage generation of own clients too and we can provide coaching on the way that we do that.

What's in it for you?

Potential to earn bonus based on completing in excess of £8,750 of new business on a monthly basis in consistent quarters. There is a % of this paid as a bonus over a year providing the opportunity to earn well. Ongoing remuneration included.

Training program run by Sales Manager using existing advisers, providers and NHS resources. Look to get individuals signed off to see clients in 6-8 weeks depending on their ability and willingness to progress.

This provides an opportunity to work in a niche area of advice with clients who are potentially higher net worth than the average person.

Laptop provided.

AE scheme with Royal London.

Ultimately this role should/could present a long-term opportunity for the right candidates. You can choose to become self-employed in the future if you have the desire to achieve that.

Job type: Full-time, Permanent

Basic salary: £36,925 - £45,000 per year, based on previous experience.

What are you waiting for?

If you'd like to join the team send your CV to: VictoriaR@legalandmedical.co.uk along with a short cover letter.