



Wealth Matters

DESTINATION: FINANCIAL FREEDOM



LEARNING FOR LIFE

FAST-TRACK YOUR CAREER IN FINANCIAL PLANNING WITH WEALTH MATTERS



A great opportunity to learn while you work and advance your career and salary throughout your training

WHAT IS LEARNING FOR LIFE?

At **Wealth Matters**, we're proud of our team and the part we play in helping our clients find the financial freedom to live the lives they want.

Now we're looking to invest in the right people to join us on our mission.

Our training programme, Learning for Life, is a four-year pathway to achieving financial planning qualifications on the job. It's an opportunity for those who have just left university or are looking for a career change to develop valuable skills and qualifications in one of the UK's top financial planning firms.

WHAT ARE WE OFFERING?

- » A structured path to becoming a fully qualified **Financial Planner or Paraplanner**, with flexible options for additional training.
- » Competitive starting salary that increases as you progress through your qualification track, plus built-in paid study leave, completion bonuses and other benefits.
- » A team that'll support and guide you on your journey, including some of the UK's most qualified and experienced Financial Planners.
- » A position in an award-winning company that's committed to nurturing its people and maintaining long-standing relationships with clients.
- » The first step in a financially and emotionally rewarding career, with plenty of scope for further progression. A career for life!



WHO IS THIS FOR?

We're looking for talented individuals to develop their skills and knowledge with us, so you don't need to have previous financial services experience. While we don't have a particular list of requirements, you do need to be:



Good with people and able to communicate clearly

Proficient with numbers and technical information

Organised, with good attention to detail

Honest and hard-working

Enthusiastic about a future in financial services

EXCELLENCE, OPTIMISM AND PASSION

We think the cultural fit matters too, which is why it's important that you're able to share our core values:

Go the extra mile

We're here for our clients, whatever they need, whatever it takes

Get it done

We understand what's needed and we get down to it

Make the client love you

We never forget who we're serving. We're honest, open and always available

Be a great team member

We support one another and we seek solutions

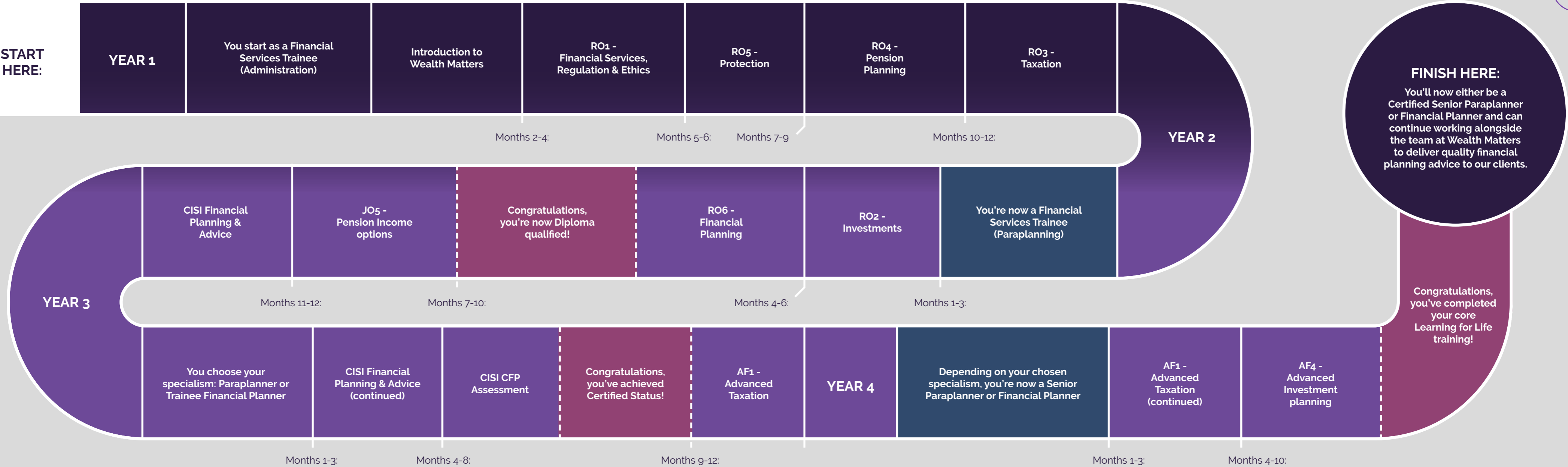
Growth mindset

We embrace challenges, overcome setbacks and continually improve

YOUR LEARNING FOR LIFE QUALIFICATIONS TRACK



START HERE:





Let's delve a little deeper into those foundation years:

Year 1

This time is very much focused on learning the terminology and basics of the financial planning process, as well as getting to know the regulatory requirements and dealing with third party providers. You'll start doing your first exams to build up technical knowledge.

Year 2

There'll be more exams, after which you're able to become diploma qualified. You'll be writing client reports and actively supporting the Financial Planners in client meetings, putting that technical knowledge to good use. By the end of the year, you'll know which specialist track you'll be following in year 3 before becoming fully qualified in year 4.

Throughout the programme, you'll be supported by experienced colleagues and coached by the head of each department in the specialist areas. You'll also have quarterly check-ins with our directors.

HOW DOES IT WORK?

For the first 18 months, you'll be in the apprentice role of Financial Services Trainee. This is your chance to get to know the ins and outs of financial planning before you decide whether you want to specialise as a Paraplanner or a Financial Planner.

Wondering what the difference is between the two? If you find working with clients and managing relationships appealing, then the Financial Planner option is likely to suit you. If you prefer the more technical and research elements, then Paraplanning may be a better fit. We'll assess your progress together over the course of the first two years, and then you choose your track based on your preference and skills.

You'll be in contact with our clients from the early stages. From year one, you'll be able to work alongside our experienced staff and shadow client meetings. In year two, you'll refine your paraplanning skills to present elements of the report to clients.



WHY WE CALL IT LEARNING FOR LIFE

We believe that understanding the whole planning process – the hows and whys of all that is financial planning – makes for the very best financial professionals. By starting from the basics to learn the entire financial planning journey, you'll be best equipped to work efficiently and excel in the industry in the long term.

We won't say it's not hard work, but we think the results are well worth it. At the end of the programme, you'll be as well qualified as any adviser in the country, with more foundational knowledge than most.

At Wealth Matters, we're invested in making sure our people thrive through further training and career development. If you have the commitment and drive to take on this opportunity, your efforts will be rewarded with a career for life.

"I genuinely love helping clients achieve true financial freedom. Getting them to step away from detail and making them think about what they want to achieve for themselves and their families. It changes people's lives. That's why it's so much more than just a day job."

Julian Gilbert,
Director



"We believe that everyone deserves financial peace of mind and that's exactly what we've been doing for our clients since 1999. I'm incredibly proud to have built a team of some of the most qualified financial planners in the country over that time. And I'm excited about the future, welcoming more talented people into this fantastic industry and helping them reach their full potential. We hope successful trainees will stay with us for many years, helping us expand the team and support our growth while bringing their own unique skills to us.

It really is learning for life."

Julian Gilbert
Director and Founder of Wealth Matters





WHY WEALTH MATTERS?

We know there are other financial planning graduate schemes out there, but we think our company is pretty special. Here are a few reasons why:

Over 20 years of quality service

Believing everyone deserves financial peace of mind, Julian Gilbert set up Wealth Matters in 1999 to help people look to the future with confidence. Over two decades later, the business is still dedicated to helping clients reduce their taxes, invest smarter and retire on their own terms.

Investing in our people

We recognise that our team is what drives our business and why our clients stay with us for generations. That's why we're committed to continuing to help all staff become even more skilled and qualified as they grow their career with us.

Innovative approach

We're independent and offer a range of in-house tools and solutions that you can't find anywhere else. This includes our trademarked investment methodology, the Wealth Matters Risk-Assessed Performance System, or WRAPS™, and its ethical equivalent, WRAPS™ Halo.

Living our values: excellence, optimism and passion

One of only 67 Accredited Financial Planning Firms™ in the UK, Wealth Matters holds the gold standard of professionalism and quality as determined by The Chartered Institute for Securities and Investments (CISI). We've also been voted a top 100 Financial Planning Firm for 4 out of the last 6 years by New Model Adviser.

Dedicated to diversity

We make sure opportunities for career progression are open to everyone and we're fully committed to building a leadership team that promotes inclusion. We've signed up to the HM Treasury's Women in Finance Charter to help build a more balanced and fair industry, and now have an even gender balance on our senior team.

Outstanding team in an accessible location

As a close-knit team that cares about the wider community, we're proud to support some great charitable causes through sponsorship, donations and volunteering work. And with a head office in Luton, we're within easy reach of the capital and surrounding area.

"I enjoy working at Wealth Matters as people here care about me as a person and about my professional growth. The team I look after work well together to produce the necessary results."

Carmen Bacaoanu ASCI,
Head of Paraplanning

"I like working at Wealth Matters as we all share the same company values and goals, which ultimately go towards helping our clients and putting them first."

Esther Walker CH MCSI,
Partner

"It's really important to me, not only to enjoy the work that I do, but also enjoy being with the people that I work with. The team at Wealth Matters are really lovely and I like to think I've built great relationships with the clients I work with."

Alison Howe,
Client Relationship Manager

READY TO APPLY?

TO GET STARTED, EMAIL US YOUR CV AND A BIT ABOUT YOURSELF, TELLING US WHY YOU'D LIKE TO WORK WITH US.

info@wealth-matters.co.uk

