

Jacksons Meaningful
Financial Planning

Interested
in being
our new
Financial Planner?





Do you have that magnetic vibe that draws people in?

Are you genuinely curious about others, able and wanting to deep-dive into their dreams, their story, and help them find out what's next for them?

Can you break down complex scenarios in a way that talks to people, gets them hooked? Are your listening skills at the top of your game and is there something in you that wants to challenge the status quo?

If so, we would love to chat with you about joining our amazing team and working alongside some incredible clients.

Come take a look at our [website](#), scroll through our [instagram](#) page and get a feel for who we are and how we work.

Great - you're still here! Now here's the question: could we be the right fit at the right time for you?

We are all about making a meaningful difference to the people that we are lucky enough to work with and guide. We ask our clients to come on a journey with us and we need you to help give them perspective, to educate and to empower them to make good decisions.

We need you to work with our clients closely to understand and help develop their thought processes around their financial journey.

You'll need to work with our technical team to research options and help create solutions with financial planning that makes all the difference.

And we need you to be able to communicate complex plans and solutions in engaging language that anyone can understand.





What are we looking for?

Mainly that you are on the same page as we are when it comes to financial planning, and that you're a great fit for the team. As a financial planner there is a lot to consider when working with colleagues and clients. We could list hundreds of bullet points, but here are the biggies:

- **J** **You must be open-minded.** We celebrate our differences here and work with clients from all walks of life.
- **J** **We are all about financial planning here.** We challenge our clients' thinking - and each other's - to find the best solution, so having a brain that likes to solve problems is important.
- **J** **Communication is key.** You need a true understanding of what it takes to work within a successful and focused team. You need to know your own mind but be willing to hear others out.
- **J** **Willing to grow.** We are a busy practice; you will be fully involved from day one. Knowing how you work and at what times of the day you are at your best allows us to play to your strengths. You must be humble and teachable – there's no place for divas here.
- **J** **Bring yourself.** It is really important to us that you to feel safe in your workspace, we have a Beyond Self initiative that encourages you to bring other passions and skills to Jacksons. We all have something that makes us different; we want to celebrate you!

You might be considering this role if:

You have a Diploma in Regulated Financial Planning and either are already Chartered, or are on your way to being Chartered.

You have a couple of years' experience of looking after clients and helping them on their financial journey. We have some complex stuff going on here that we love demystifying for people.

You want to be challenged by every aspect of your day. Working at Jacksons is demanding - we work four days and we have fun doing it, but we really want to support our clients and each other.

You are already a financial planner looking for a new challenge with a new company. It's funny how the same role can look and feel so different from the perspective of working within a different team.

You want to be part of a growing team who are pushing the boundaries of financial advice, celebrating this role and inspiring others to join the ride.

You have a passion for helping others in a financial setting, whether it be our clients or inspiring and coaching the team around you.





What does the day-to-day look like?

- Self-organisation of your thoughts and your workload for the day.
- Meeting with other team members to explore and evolve our client communication.
- Record your thoughts, challenge them and work with others to make sure you have covered every scenario.
- Use your skills to complete calculations and put together planning options.
- Organise and run planning meetings and work through cashflow models to help the client visualise their options.
- Research, study and write financial plans with paraplanners for our clients.
- Work together with our Client Relationship Managers to support our clients.
- Speak to and support other team members as well as chatting to our clients and providers.

A bit about us

We're a team of independent experts with one shared goal: making money work for our clients, so that they can live their best lives. Jacksons was established almost a century ago and has been a trusted name in Cornwall ever since. We're proud of where we've come from, but for us it's tomorrow that matters most.

Our committed team helps clients work towards their goals every day. These goals are what guide us, drive us, and motivate us on their behalf. Yes, we're financial planners, but it's not money that excites us – it's what money can do for our clients.

Our CEO Pete Matthew is an award-winning YouTuber, podcaster and published author – a pioneer of educating the British public about how money works. His efforts in content creation means a constant stream of fascinating, diverse and professionally interesting clients wanting to work with Jacksons from all around the UK.

Working for Jacksons means working with Pete. We have a growing team that we want to nurture, coach and empower to look after our clients in a relaxed yet positive way. Pete is an integral part of this training.

Aaannnd the best bit? You get to work with our existing team of exceptional financial planners. They are all different, bringing a variety of thoughts and ideas to how we help our clients. They are technical so can help you along the way but most of all they are giving, remember they were also at the beginning of this journey once!

If you have taken the time to look at our website, you will see that our people and their wellbeing is at the heart of everything we do. We believe that Jacksons is a vibe, and we want you to feel part of something special. We are trying to break through boundaries and old traditions to attract both clients and team-members with our culture, people first.



What's in it for you by joining the team?

A four-day working week but paid for five days - this has to be top of the list of benefits! We love the freedom and the rest it gives us.

A flexible work pattern that includes hybrid working. A happy balance between home comforts and a fun hub.

Physical and mental health support – time for GP & dentist appointments and a counselling service to support you through difficult times.

A leading maternity and paternity package – we want you to always want to come back to us.

A pension and a death-in-service policy to help provide support for the now and when.

Room and support for growth within yourself, your role and the business.

A new open-plan space to work in where you get to collaborate with the rest of our talented team.



What do you need to do to get involved?

You know the drill, simply pick up the phone (we love a good chat), drop an email to sharon@jacksons.life, or go to the careers page on the website.

We have tried not to include a strict criterion as you know what, if it feels right then it feels right. If you are ready to join the Jacksons journey, we want to hear from you.

This could be the best thing you have ever done!

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www.jacksons.life

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