

Jacksons Meaningful
Financial Planning

Interested
in being
our new
Paraplanner?





Can you tell a story?

We want to unleash the writer in you.

Come take a look at our [website](#), scroll through our [instagram](#) page and get a feel of 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 need you to work with our team to understand our clients' journey, to research options and to help create solutions, playing an active part in their future, 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 paraplanner 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 others - 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 and 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.

You might be considering this role if:

You have or are on your way to a Diploma in Regulated Financial Planning or are Chartered.

You are an adviser who wants a change in direction; we would love to talk to you about what a paraplanner role here could offer you.

You are already a paraplanner looking for a new challenge.

You want to be part of a growing paraplanner team who want to be instrumental in celebrating this role and inspiring others to join the ride.

You have a passion for helping others in a financial setting.





What does the day-to-day look like?

- J Self-organisation of your thoughts and your workload for the day.
- J Research, study and write financial plans with advisers for our clients.
- J Be a part of planning meetings and work through cashflow models to help the client visualise their options.
- J Use your skills to complete calculations and put together planning options.
- J 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.

[Unfortunately, the role also means working with Jacob, Elliot and Tom, our existing paraplanners. Actually, they're not so bad, once you get to know them!]

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 we love about working here

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.

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

A new open space to work in where you get to collaborate with the rest of the 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!

01736 360717

www.jacksons.life

The logo for Jacksons, featuring the word "Jacksons" in a bold, orange, sans-serif font. A small white circle is positioned above the letter "J".

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