Role Profile

Job Title:	Financial Practitioner	**Areas:**	London & South East
Reporting to:	Regional Manager	**Hours of Work**	Mon – Fri, as business requires

Job Purpose:
To acquire and retain profitable business for the Hargreaves Lansdown group through the provision of compliant individual advice.

Key Duties and Responsibilities:

- Meet the requirements of the T&C scheme for competence to advice on an ongoing basis
- Qualified by professional examination to CII Regulated Diploma or equivalent level
- Application of Hargreaves Lansdown company culture and our Treating Clients Fairly approach
- Effective verbal and written communication
- Able to assist clients to make informed buying decisions
- Effective administration and organisation skills
- Commercial approach to all aspects of business
- Maintenance of a professional appearance and approach when representing Hargreaves Lansdown
- Meet all company standards in relation to dealing with clients and enquiries
- Operate within licensing restrictions and approved areas of advice at all times

Person Specification

Criteria	Essential	Desirable
Qualifications	• CII Regulated Diploma or equivalent • Relevant Advisory Experience	• Advanced Pension qualifications including G60, AF3
Knowledge / Experience	• Previous success in advisory based roles • Experience in advising clients on Investments, Savings, Pensions and Estate Planning	
Skills	• Effective verbal and written communication skills • Commercial approach to all aspects of business • Good attention to detail • Strong administration and organisational skills	• Proactive approach to maximising returns from the resources available • Ability to demonstrate problem solving skills
Attributes	• Hardworking and proactive • Positive 'can do' attitude • Well organised and reliable • Diplomatic and adaptable • Able to work independently from home • Ability to stay calm under pressure • Flexibility in working hours	• Resourceful and willingness to continue development by self-learning.

Written by Head of Advisory Sales,