

## **Financial Adviser (Career Transition Programme)**

### **Build a second career in financial advice through the Mattioli Woods Financial Adviser Academy**

You might be successful where you are. But success doesn't always mean fulfilment. Many of the best financial advisers didn't begin in financial services. They built careers in other industries - earning trust, developing judgement, learning how to work with people - before deciding to apply those skills in a more meaningful way.

The Mattioli Woods Financial Adviser Academy is designed for exactly that transition. It offers a structured, fully salaried route into financial advice - combining professional qualifications, hands-on experience and genuine mentorship - so you can build a long-term career without starting from scratch.

#### **What sets this apart**

Most routes into financial advice require you to take financial risk early in your career. We don't.

- A fully salaried role from day one - removing the financial uncertainty of changing careers
- Fully funded professional qualifications (RO2-RO6)
- One-to-one mentoring from experienced advisers
- Real client exposure from early in the programme
- A structured pathway from career changer to confident, credible adviser
- Comprehensive benefits package

This is not theory followed by practice. It's built to develop both at the same time.

#### **Who this is for**

You've likely built your career in a role where:

- You've worked closely with clients or customers and earned their trust
- You've had to explain complex ideas clearly and confidently
- You've taken ownership of outcomes, not just activity
- You're comfortable being accountable and working to high standards

Your experience might come from banking, sales, mortgages, the military, teaching, professional services, a mum looking to return to work - or somewhere less obvious. You don't need a background in finance. What matters is your ability to build trust, ask the right questions and guide people through important decisions. Judgement, empathy and communication are what define great advisers.

We'll teach you the technical side.

## What you'll need

- Experience in a customer-facing or relationship-driven role
- Strong communication skills and professional presence
- The discipline to study and develop independently
- Curiosity, resilience and long-term motivation
- Eligibility to pass pre-employment checks, including DBS
- RO1 completed before your start date\*

\*If you don't yet have RO1, we'll support you to complete it. Mattioli Woods will reimburse the cost upon successful completion and your start in the Academy.

## Your journey through the Academy

This is a structured programme, but more importantly, it's a progression in confidence, capability and identity.

### Term 1 (3.5 months) - Building credibility

Complete RO2-RO5 while developing your technical knowledge, regulatory understanding and professional foundation.

### Term 2 (2.5 months) - Learning to advise

Complete RO6 and gain a deep understanding of how advice works in practice - our proposition, processes and standards.






### Term 3 (6 months) - Learning alongside experienced advisers

Work closely with a senior adviser, observing real client interactions and gradually taking on more responsibility. This is where learning meets reality.

### Term 4 (9 months) - Building confidence and consistency

Refine your approach with ongoing coaching, feedback and structured development - focusing on the craft of advice and long-term success.

## Application process

-  Stage 1: Submit your CV and expression of interest
-  Stage 2: Complete an online questionnaire
-  Stage 3: 20-30 minute HR phone interview (if shortlisted)
-  Stage 4: Assessment day
-  Stage 5: Final interviews

## A different kind of career move

Changing career can feel like stepping into the unknown.

This is designed to remove that uncertainty - giving you the structure, support and financial stability to make a considered transition into a profession built on trust, relationships and long-term impact.

If you're ready to apply your experience in a more meaningful way - and build a career you can truly own - we'd love to hear from you.