



Build a career in financial advice through the Mattioli Woods Adviser Academy 🚀

Ready to launch a career in financial advice? Applications are now open for our Adviser Academy – a multi-term programme over 12 months, designed to take you from trainee to expert financial planner.

Fully **salaried** from day one, genuine one-to-one **mentorship**, and real client **exposure**.

The Mattioli Woods Adviser Academy delivers one of the most credible adviser development programmes in the profession. A demanding but properly supported pathway for those with a professional services background.

📍 Opportunities available across **Leicester**, **Stockport**, and **Belfast**.

Essential requirements

We're looking for people who already know how to work with clients and now want to turn that experience into a long-term profession. You'll bring:

- 2–3 years in customer-facing roles such as banking, mortgages, sales, customer service
- clear, confident communication and a genuine interest in helping people make better decisions
- strong attention to detail and professionalism, with the discipline to study independently
- solid literacy and numeracy skills, and the confidence to work with technical information
- resilience, curiosity, and ambition for a long-term career in financial planning
- eligibility to pass full pre-employment checks, including DBS
- RO1 exam completed before starting*

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

Our investment in you

From the outset, we remove unnecessary risk so you can focus on achieving excellence. You can expect:

- ✓ a fully-salaried role from day one, through to your adviser career and beyond
- ✓ fully-funded professional qualifications (RO2–RO6)
- ✓ genuine one-to-one mentoring from experienced advisers
- ✓ real client exposure under supervision
- ✓ structured development across core adviser skills
- ✓ clear progression pathway from trainee to confident, credible adviser
- ✓ comprehensive benefits package

Your four-term journey

Each term builds on the last, moving from knowledge and understanding to application and independence.

Term 1 (3.5 months) – professional foundations

Complete RO2–RO5 with industry-leading pass rates. Build technical knowledge, regulatory confidence, and professional credibility.

Term 2 (2.5 months) – training to advise

Complete RO6 and learn the Mattioli Woods way. Build a deep understanding of our proposition, processes and people through dedicated sessions delivered by in-house and external experts.

Term 3 (6 months) – one-to-one mentoring

With a senior adviser assigned to mentor you, you will shadow them closely, developing a comprehensive understanding of the role and what excellent advice looks like in practice, while becoming progressively more capable.

Following term 3 and successful completion of internal assessments, you formally begin your career as a Mattioli Woods adviser.

Term 4 (9 months) – early career support

Now in your role as an adviser, it's time to further refine your skills with an emphasis on meeting craft and commerciality. You'll receive ongoing coaching, with structured time to reflect on your performance, identify areas for improvement and sharpen your abilities.

The application process

-  **Stage 1:** Submit your CV and expression of interest
-  **Stage 2:** Complete a questionnaire and submit a three-minute video
-  **Stage 3:** 20–30-minute HR phone interview (if shortlisted)
-  **Stage 4:** Join us for our Assessment Day on 6 May
-  **Stage 5:** Attend a final interview on 11 or 12 May

Ready to shape your future?

 Join our Adviser Academy and become part of a fast-paced, vibrant team that's shaping the future of wealth management at Mattioli Woods. Applications are now open.