Mattioli Woods

JOB TITLE: Trainee Consultant
LOCATION: Leicester
CLOSING DATE: 29th January 2025

We are currently recruiting for highly motivated individuals to join the June 2025 intake for our Trainee Adviser academy. This is a 12 month in-house fully funded programme where you will gain valuable knowledge and undertake the Level 4 Diploma in Regulated Financial Planning.

Our engaging and stimulating programme is the perfect start to your career in financial advice. You will develop your confidence, gain knowledge and advisory experience as well as profit from an excellent network and diverse curriculum through our structured and supportive environment.

During the programme you will be mentored, guided, and supported drawing on expertise and experience from our leading consultants.

WHAT YOU NEED TO SUCCEED

- up to three years' of working experience in sales, banking, mortgages, customer services related sectors (required)
- up to two years' experience of in a Financial Services related role (desirable)
- commitment to joining a progressive development programme
- genuine interest in financial planning, delivering clients outcomes
- excellent literacy and numeracy skills
- confident manner and an ability to communicate with stakeholders at all levels

Applicants must have a full, clean UK driving license (manual is a preference) and must clear our DBS checks.

THE TRAINING SCHEDULE

You will be enrolled into the Mattioli Woods academy where you will have face-to-face training with our dedicated and experienced trainer. On successful completion of the programme, you will join our expert team of Wealth Management Consultants (Financial Advisers).

The duration of the training programme is 12 months long; stage one consists of nine months and stage two is three months. The program will involve:

Stage one
- completion of R01- R05 exams
- you will be embedded within our advice process framework including paraplanning and client facing activities/work

- completion of monthly assignments within the designated deadlines
- participation in all training sessions

Stage two

- completion of R06 exam
- participation in all technical training sessions across a wide range of subjects
- attend client meetings with a consultant on a weekly basis
- provide support to the consultancy team

BENEFITS YOU GET IN RETURN

As well as an excellent career progression with fantastic opportunities for promotion you will be part of a national wealth management business with an in-house training programme. You will also have access to technical teams to help with complex planning as well as a specialist investment team to help navigate clients through these complex times.

Your benefits package includes the following:

- group pension
- life assurance
- income protection
- health cash plan

As well as being part of a great team you will also have the exciting opportunity to take part in social events such as charity fundraising and other social activities on a regular basis.
Apply now for this exciting life changing opportunity!