ellis bates
FINANCIAL ADVISERS

Ellis Bates

Paraplanning Accreditation Programme

Ellis Bates Academy

To be the best version of ourselves and the best at what we do

About Ellis Bates

Ellis Bates Financial Advisers has been growing since 1980. Through both organic and non-organic growth and over £1billion in assets under administration, it has become one of the leading independent wealth management business's in the North of England.

The rapid growth is testament to the ambitious expansion plans of bringing personal, experienced wealth management to clients. Ellis Bates continues to expand its proposition and is looking for ambitious trainee Paraplanners who want to build and develop a career in Paraplanning.

About the Programme

This is an Ellis Bates Academy programme which, on successful completion, recognises you as a fully trained and accredited Paraplanner within the business.

It is designed to give you the opportunity to benefit from structured training which takes you from a trainee to a fully competent paraplanner within 12-18 months, depending on your pace of learning and progression.

The Training

You will be provided with a personalised training plan giving you the opportunity to learn and develop skills in all aspects of the paraplanning role. It will include:

Induction

Get to know how our New Client Team works; learn about our investment and provider panel; experience what our Compliance team do, how they work and what they look for in a great report; and you will go on a visit with an Adviser to better understand how we work with our clients.

Technical knowledge programme

There are two parts to this programme:

1. Knowledge/qualification – as an alternative to attaining a CII Diploma qualification, you will undertake a knowledge programme on Evolve, our on line learning system, which includes a series of modules and assessments. This will provide you with the technical content you need across all advice areas. Once passed, if you wish to go on to study for a CII qualification, we will discuss this with you.
2. Workshops – you will attend interactive classroom based learning and take a short assessment to test your learning on subjects such as cashflow modelling, calculations, products and more.

Report writing

We provide on the job training through the various stages of report writing, starting with packaging reports, and then moving on to writing simple, standard and complex reports. You need to be signed off on each report stage before moving on to the next and we will guide you through this based on your pace of learning.

Adviser visits

Once you are up and running with a particular report type, you will accompany an Adviser on a visit and then write the report for that client once you return to the office. This will apply to Mortgage, Pension and Investment cases and will help you to understand the process from client meeting, to report, to presenting client solutions.

Skills training

When planning your training, we will discuss and agree with you soft skill training that will support your personal development through the programme. The training provided will take into account the needs of the other trainees across the business and will be booked into your diary in advance.

121s

Your team leader will meet with you on a 121 basis at least monthly. The Manager and Academy Trainer will also meet with you periodically to review your progress and get your feedback.

Become Accredited

Each stage of your training programme will be reviewed and assessed. You need to successfully complete and pass/be signed off on every area in order to achieve accreditation.

Once you are successful, we will award you with your accreditation certificate and you will be considered a fully trained paraplanner. Accreditation will automatically entitle you to be interviewed for further opportunities within the paraplanning team and we will actively support you with your career development as and when you are ready.

Eligibility and application process

- No previous experience in paraplanning is required to join the scheme. If you currently work in a financial services environment then this is likely give you an advantage during the application process.
- A CII qualification is not required, but we will be interested to know what learning and/or study you have done in your career to date.
- Both internal and external candidates may apply.
- Please check with HR as to when the next intake is planned for. We are happy to register your interest in the programme at any time, and we will contact you as soon as the application process begins.

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