



# Britannic Place

Financial Management Ltd.

## Job Vacancy - Practice Manager Required

### Our Passion

We are a boutique financial planning firm that works with a relatively small number of clients to ensure that they live the best life that they can with the resources that they have available.

We work with successful people who are coming up to or who are already in retirement.

### Our Core Values

We live by our core values and we want to hear from you if you believe in them too. Here they are:

- **Knowledge** – we always strive to learn new things, improve our skills and obtain the highest levels of professional qualifications. Our knowledge is our power.
- **Honesty and Integrity** – we hold ourselves to high moral and ethical standards, which results in relationships built on trust, allowing us to accomplish more together.
- **Collaboration** – we believe that the best outcomes can only be achieved by adopting a collaborative approach to all that we do.
- **Accountability** – we believe in the importance of taking individual and collective ownership of tasks to achieve agreed goals and objectives.
- **Balance** – we believe that creating and maintaining a healthy work-life balance is essential for all.

### Who are we looking for?

We are looking for a Practice Manager to act as an integrator between our Principal and the rest of the team; a driven individual who will help us drive and shape the business. Some of the essential requirements for the role include:

- Highly organised, methodical, analytical and disciplined
- Excellent communicator (both verbal & written)
- Excellent ability to prioritise and plan workload
- Good knowledge and understanding of broad principles and issues concerning Human Resources Management
- Innovative and creative thinker
- Excellent team management ability
- Highly numerate
- Adopts a positive attitude, willing to assist others when busy
- Able to work under pressure
- Excellent attention to detail

**Britannic Place Financial Management Limited**

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- Proven capability in marketing, client servicing, and business development
- Excellent knowledge of legal and compliance requirements relevant to the role
- Excellent knowledge and understanding of the Financial Services Industry
- Excellent Microsoft Word, Excel and electronic diary management skills
- At least 3 years' relevant industry experience
- At least 3 years' working within a financial planning environment
- At least 1 years' experience of team management

## **What's in it for you?**

We offer the opportunity to be part of a small but high achieving team of like-minded people where you can really make a difference.

We are based in Evesham on the edge of the Cotswolds.

We offer a competitive salary and benefits package.

## **Interested?**

If you feel you're the right person to join our team, then please send your CV to Steve Perera ([sperera@britannicplace.co.uk](mailto:sperera@britannicplace.co.uk)). No agencies please.

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