MARK J REES

Wealth Management

# Financial Adviser
# MJR Wealth Management

## Background

MJR Wealth Management is the financial planning team at Mark J Rees LLP, Chartered Accountants, that provides regulated financial advice to individual and corporate clients of the practice. Advice is also provided to other clients that have been referred to us by third party connections. New work enquiries are provided by the accountancy practice.

As a professional practice, our focus is on providing advice of the highest quality, with an agreed ongoing service to all of our clients. We charge fees for all work undertaken, based on the time incurred for each task. All employees record their time for all aspects of our work.

The main advice areas we deal with are;

- Pensions – SSAS and SIPP (including property purchase), pension drawdown, pension transfers, Workplace pensions
- Investments – advising and managing personal, pension and trust portfolios
- Protection – dealing with corporate cover requirements including keyperson and shareholder
- Estate planning – advising clients with regard to Inheritance Tax planning opportunities

The Wealth Management team currently comprises an experienced Financial Adviser, with excellent support being provided by two administrators.

## Requirements

The new Financial Adviser will work with the existing Adviser and needs to be Level 4 Diploma qualified and experienced at providing all round financial planning advice to prospective and existing clients. A good technical knowledge is required, especially with regard to pensions.

As a member of a small team, there will be a requirement to be involved in a range of tasks which will initially include some research and report writing, as well as dealing with investment portfolio management. Whilst the Financial Adviser will initially be mainly office-based (Leicester city centre), there will be a requirement to visit some clients at their place of work or at their home.

In summary, the Financial Adviser role involves:

- Being part of a small and very efficient financial planning team within a well-established Chartered Accountancy practice
- Offering an excellent Financial Planning proposition to the clients and new clients of the practice, especially in the pensions sector
- Providing and managing a first-class ongoing client service programme
- Working closely with the Accountants and establishing good working relationships with them, providing their clients with an excellent financial planning service
- The management of existing investment portfolios and providing appropriate investment advice
- Product research and selection of the most appropriate products including report writing

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