

# Join Our Team.

**We're on the lookout for an aspiring financial services professional to join our Client Services team in Liverpool, and we want to hear from you!**

This is a great opportunity for a Graduate who is passionate about excellent client service and financial planning.

We're proud to offer:

- Professional development
- A supportive environment
- Competitive package of compensation and benefits

# Join Our Team.

## About Us

Astute Private Wealth is a respected financial planning firm dedicated to providing tailored wealth management services to our clients. We pride ourselves on our commitment to excellence, our client-focused approach, and ability to deliver personalised financial strategies that help our clients achieve their long-term goals.

## Your Role

**You will play a vital role in supporting our Financial Planners and ensuring the smooth operation of our Liverpool office by:**

- Working with insurance, pension and investment providers to ensure clients' plans are administered correctly.
- Managing administrative tasks such as scheduling appointments, answering phone calls, and handling correspondence.
- Assisting with client servicing and maintaining accurate client records.
- Coordinating meetings and events, both internally and with clients.
- Providing general office support and contributing to the overall efficiency of our operations.

## What We're Looking For

- Strong organisational skills and attention to detail.
- Excellent communication and interpersonal abilities.
- Proficiency in Microsoft Office Suite and other relevant software applications, such as Intelliflo.
- A proactive attitude and willingness to take on new challenges.

## Why Join Us?

At Astute Private Wealth, we believe in investing in our team's development and success. As part of our team, you'll have the opportunity to advance your career, enhance your expertise, and contribute to the growth of our firm. We offer a competitive salary and benefits package, along with a supportive and collaborative working environment.

If you're ready to take your career to the next level and join a firm that values expertise, innovation, and client care, then we want to hear from you! To apply, please submit your CV and a cover letter detailing your experience and why you're the perfect fit for this role to [abothwell@astutepwLtd.co.uk](mailto:abothwell@astutepwLtd.co.uk).

**Become a key player in helping our clients achieve financial success. Apply today and join the Astute Private Wealth team!**

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# Our Values.

Our values are our guiding principles; they are the foundation on which we build the support that we provide for both our clients and colleagues.

## **We Care**

At Astute, caring is the cornerstone of everything we do. We prioritise client satisfaction above all else and we understand that every interaction with our clients is an opportunity to make a meaningful difference in their lives.

We recognise that our greatest strength lies in our unity as a team. By fostering a culture of teamwork, empathy, and mutual support, we amplify our collective impact for our clients.

## **We Are Transparent**

Integrity is the bedrock of our business. We hold ourselves to the highest standards of honesty, ethics, and transparency in all our dealings. From our financial practices to our client interactions, transparency and accountability are non-negotiable.

## **We Uphold High Standards**

Excellence isn't just a goal; it's our standard. We value continuous improvement within our firm, where every team member is dedicated to consistently delivering nothing short of the best for our clients.

By encouraging our team in their continued personal and professional development, we proactively work to ensure that we can maintain a high level of service to both clients and colleagues providing informed advice and up-to-date solutions.

## **We Think Forwards**

We don't just react to change; we anticipate it. By embracing innovation and technology we work to ensure that we continue to have the best tools available to position ourselves and our clients for success.

## **We are an Inclusive Team**

We know that we can provide our best service by working together; supporting each other in supporting our clients. We care about working hard to nurture a spirit of teamwork, collaboration, and mutual respect among our team.

We recognise that each individual brings a perspective built on their unique life experiences and it is important to us that we maintain an environment in which every voice is heard and valued. This helps us to better understand and support our clients and colleagues.

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# Our Benefits Package.

Join Astute Private Wealth and enjoy a comprehensive benefits package designed to support your professional and personal well-being:

## Generous Holiday Entitlement

Starting from 22 days of annual leave, in addition to bank holidays, and enjoy an extended break during the Christmas period to recharge and spend quality time with loved ones.

## Holiday Flexibility

Tailor your time off with the option to buy or sell holidays, allowing you to adjust your leave according to your personal and family needs.

## Death in Service Life Cover

Receive peace of mind with a death in service benefit providing life cover worth 4 times your annual salary, ensuring financial security for your family.

## Company Sick Pay Scheme

Benefit from our company sick pay scheme, starting with 1 month's full cover, to support you through any health challenges without financial worry.

## BUPA Health Cash Plan

Access a BUPA Health cash plan that helps you manage healthcare costs, including dental, optical, and other health-related expenses, promoting your overall wellness.

## Study Support

Pursue further education and professional qualifications with our study support program, including financial assistance, revision support, and time off for exams, helping you advance your career.

## Cash-Back Debit Card

Enjoy savings on everyday purchases with a cash-back pre-paid debit card, offering rebates on a range of transactions to enhance your disposable income.

## Free Financial Advice:

Take advantage of free financial advice from our expert team, helping you make informed decisions about your personal finances, investments, and future planning.

## Workplace Pension

Maximise your financial security in retirement by contributing to your Astute pension and benefit from a generous employer contribution. Make your contributions via salary sacrifice and we'll share our tax savings with you via increased contributions.

**At Astute Private Wealth, we value our employees and strive to create a supportive and enriching work environment. Join us to benefit from a culture that promotes professional growth, financial security, and overall well-being.**

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