

Apprenticeship Programme 2023

Job Title: *Financial Planning Apprentice*

Location: *London*

About us:

Charles Stanley is one of the UK's leading Wealth Management firms, providing our clients with tailored advice and solutions at every stage of their financial journey. Our focus on clients has endured since our foundation in 1792, since when we have created financial security for many tens of thousands of people. With over 800 employees spread across a network of over 20 offices throughout the UK, we remain committed to providing our clients with the highest standards of service.

Charles Stanley is part of the Raymond James Financial, Inc. group of companies. Raymond James Financial, Inc. (NYSE: RJF), is included in the S&P 500 and is a Fortune 500 company.

About the Programme:

This is a 15 - 18-month Financial Services Administrator apprenticeship programme, combining formal study with on-the-job learning and training, at the end of which you may be offered a permanent position with Charles Stanley.

You will study for the Level 3 Introduction to Securities and Investments (Chartered Institute of Securities & Investments). Your studies will be fully funded by Charles Stanley, and you will be given one day per week to focus upon your studies.

Throughout the programme you will have the support of your line manager, Charles Stanley's Learning & Development team, and a dedicated mentor from your team.

About the Role:

As an Apprentice you will be provided with the necessary training and support to enable you to carry out your duties. These will likely include:

- To assist with the manning of the phones within the department.
- Using our back office systems in order to keep our electronic records up to date.
- Preparation of handouts/reports for presentations and/or internal meetings.
- To produce valuations.
- To produce documents from our back office systems.
- To obtain information from third party providers.
- Using your initiative to handle issues in order to provide the team with effective support.
- Liaising with teams in other divisions / departments across the Company.
- General ad hoc duties as required, including scanning, filing, dealing with the department's post.

About You:

You don't need to have any previous work experience. What we are looking for from you is commitment, a desire to learn and a willingness to contribute. You will need to have the following:

- A minimum of 5 GCSEs (or equivalent) at grade C/4, including English and Maths.
- A willingness to learn and to develop new skills.
- A professional, methodical, and organised approach, with good time management.
- Good attention to detail particularly with written information.

- Strong interpersonal and communication skills, with the confidence to challenge when appropriate.
- A good working knowledge of MS Office, in particular Excel, Word and Outlook.

What's in it for You?

- The opportunity to obtain a professional qualification relevant to the financial services industry.
- Potential future progression within Charles Stanley.
- A competitive salary with highly attractive benefits (27 days holiday, pension, medical insurance, gym membership, season ticket loan etc.).

At Charles Stanley you will be part of a culture committed to innovation, development, and diversity, one where everything we do is driven by our core values:

- **Caring:** You are our priority. We will strive to earn and maintain your trust by promoting what is in your long-term interests.
- **Fair:** We will always act with integrity in a transparent, respectful, and professional manner.
- **Progressive:** We will combine an innovative culture with a traditional personalised service and manner.

Charles Stanley is committed to being an equal opportunities employer. We treat all applicants the same and we have a diversity and inclusion strategy aimed at ensuring we hire the best person for the job regardless of age, gender, ethnicity, sexual orientation, disability, or beliefs.