



Trainee Mortgage and Protection advisor

We are a growing Financial Advisory firm based nationally with office locations in St Albans & Harrogate, providing an exceptional and unique service to clients. Due to our expanding business, we require an additional Mortgage & Protection Adviser to maintain our high levels of service to both our clients and the professionals we have developed relations with.

Our senior mortgage advisor is moving over to our financial advice realm and along with our existing client base we have seen a huge influx in new clients and therefore need to add a new member of staff to the team. You will never be short of leads or business as you will have access to our existing client base and constant referrals from our professional network links.

Duties (include but are not limited to):

- Identify customer's financial needs and advise them with the products that would best suit their requirements for mortgage and protection and refer them to our financial adviser where appropriate (pensions and investments)
- Ensure clients understand the products and services offered and the process.
- Complete customer interviews by appointment and on demand and make sales that meet customer's needs.
- Look for opportunities to attract new customers and professionals.
- Prepare for future appointments, gathering appropriate information from colleagues generating referrals.
- Deliver a professional and credible service and ensure your knowledge is always up to date.
- Working towards sales targets and always know how you are performing against these.

Person Specification:

- CeMAP or other industry recognised qualification
- Willingness to learn new skills and acquire knowledge
- Excellent communication skills
- Ability to demonstrate excellence in your field
- Preferably a proven track record of working in a mortgage environment or a sales driven attitude to succeed.
- Outstanding levels of customer service

- Full driving licence

In return, we will provide continuous training, assistance, administration, and guidance to assist the successful applicant in achieving 'competent advisor status.' You will be trained by award winning financial advisors with over 10 years' experience in the mortgage field as well as support from a network team with over 30 years' experience. Once CAS has been achieved, the role will continue, and the applicant will become a fully-fledged member of the team. This role will be flexible between office and home with regular support through face to face and zoom meetings, as well as weekly team meetings and regular phone calls to support the applicant in their career. A progression path to financial advice is also available and paid for if desired by the applicant but only after they have mastered the mortgage and protection market.

The Remuneration package will initially be on an employed fixed term basis (6 months) as an Admin/Trainee mortgage advisor and then on an employed or self-employed basis depending on your preference with a realistic first year OTE of between £40,000 - £50,000 and much more in the years to follow. All earnings are uncapped and will increase based on how well you can convert enquiries and leads into business as well as self-generate your own leads and business. Please note a higher remuneration is paid for self-generating your own business and the realistic earnings for the first year is not based on this so the sky really is the limit!

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