

Experienced Paraplanner CV

Name

Mobile Number

Location

Profile

4-8 lines including:

- *Diploma qualified
- * Number of years of experience in Wealth Planning
- * Any technical areas of expertise
- * what you are looking for now – eg homebased, role with progression into advice, part time etc

Example:-

I am a Diploma qualified Paraplanner with over five years' experience working within XXXXXX / or Independent IFA dealing with a variety of investment and pension products. Over the last year I have specialised in defined benefit transfers and tax advantage strategies, this includes calculation for Inheritance Tax (IHT), Protection, various investment wrappers, Capital Gains Tax (CGT), Pensions, drawdown strategies, utilisation of Venture Capital Trusts (VCTs), Enterprise Investment Schemes (EIS) and various trust structures. I am looking to continue to progress my career with a new role in XXXXXX, with a firm that will support me with my studies and help me develop my skills to become a qualified financial adviser.

Qualifications

- List whether Cii Diploma or DipFA
- Any Chartered Exams
- Any exams you are currently studying for

Education

Typically the more experience you have gained the less there is a need to include your education at the beginning of your CV. So if you have more than five years' experience as a Paraplanner add your education further down the CV under work experience.

If you have less than five years' experience as a Paraplanner then Education is as follows:-

Degree or equivalent – University – Grade

A'levels or equivalent – Subjects and Grades

GCSES or equivalent – No need to split these up eg 10 x GCSE's – Grades A*-C's

Career History

- List jobs with most recent first eg:-

Company – Job Title

Dates - Dates

- Bullet point out current responsibilities
- Include any relevant tasks, software or programmes used
- Do you manage a team? Add that too

Reason for Leaving if relevant: relocation, redundancy etc

Company 2 – Job Title

Dates – Dates

- Bullet point out current responsibilities
- Include any relevant tasks, software or programmes used
- Do you manage a team? Add that too

Reason for Leaving if relevant: relocation, redundancy etc

Company 3- Job Title

Date – Date

- Bullet point out current responsibilities
- Include any relevant tasks, software or programmes used
- Do you manage a team? Add that too

Reason for Leaving if relevant: relocation, redundancy etc

Add Education here – If you have five years' + experience as a Paraplanner

Interests / Skills

References upon request