

Junior / Part Qualified Paraplanner CV

Name

Mobile Number

Location

Profile

4-8 lines including:

- * Part qualified
- * Number of years of experience in Wealth Planning
- * what you are now looking for

Example:-

I am currently working as a Junior Paraplanner for a financial planning firm where I have a range of responsibilities including writing suitability reports and undertaking research and cash flow forecasting. I am looking to complete my Diploma and continue to progress my career with a new role in London, with a firm that will support me with my studies and help me develop my technical skills.

Qualifications

- List exams passed Cii Diploma or DipFA – eg Passed RO1, RO2 and RO4
- Any exams you are currently studying for

Education

Degree or equivalent – University – Grade

A'levels or equivalent – Subjects and Grade

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

Date - Date

- List out your currently role responsibilities and tasks
- Include any additional tasks you undertake

Company 2- Job Title

Date – Date

- List out your currently role responsibilities and tasks
- Include any additional tasks you undertake

Work experience throughout Education

- List out any work experience that you did whilst in college / university under a separate section – in the same format as above, however 2-3 bullet points each – so this could be working in hospitality, warehouse, office admin etc

Interests / Skills

References upon request