

Make Recruiting Your Wealth Planning Team Easy

Here are top tips for Wealth Planning businesses looking to recruit:

- 1.** Be clear of the progression plan. Wealth Planning candidates want to know the opportunity for progression. If you're recruiting an IFA administrator, can they progress to Paraplanning? If you are recruiting a Paraplanner, could they progress to IFA? If so, how long will that progression take?
Be clear with candidates and have timelines in place so they can manage their expectations and understand what they are working towards. Outline the opportunities for learning, mentorship and formal qualifications.
- 2.** Have a very clear job description for the role and behind the scenes, a robust plan for who will handover tasks and deliver initial induction/training.
Decide what skills, character traits and behaviours this person will need in order to achieve these tasks and find success in the role. e.g. attention to detail, Excel database skills, numerical and analytical skills. Don't leave anything out.
- 3.** Be prepared! Have a detailed onboarding process for the candidate and communicate that at interview. This will reassure the candidate that they will be well supported, whilst ensuring you have an efficient process that enables them to 'hit the ground running' as soon as possible.
- 4.** Be upfront about your flexibility. If the role offers flexible working, or a mixture of time in the office and time working from home – communicate at interview. In a post-Covid world, some candidates will be looking for roles that offer regular working from home. It may be that your business can facilitate this, or that you are an office-based organisation.
- 5.** Prepare for personality! Recruiting a successful candidate is as much about cultural fit as it is experience and qualification. If the role will incorporate areas of Paraplanning or advanced admin – look for a candidate with obvious ambition for progression! If you know you need a steady hand who will stay in the same role, look for a 'career' admin instead of a progressive one. The more open and upfront you are about your expectations at interview, the more successful your hire will be.

If you'd like to continue the conversation, ask a question or discuss your Wealth Planning recruitment needs – we'd love to hear from you. Get in touch at kate@cranleighpersonnel.co.uk or 01483 279837.

