

lecturer.

Job summary

To deliver financial education to employees of WEALTH at work corporate clients across the UK. To engage with employees during the delivery of seminars, webinars and all educational interventions to introduce the other services of WEALTH at work helping the organisation to ensure profitable client/personal relationships.

Core responsibilities

- Delivery of educational seminars, webinars and webcasts on a range of financial subjects
- To provide technical support to other team members on the development of new modules
- To keep up to date on changing legislation ie pensions/tax
- Produce ideas for employee education e.g. changes to pension & share schemes
- Design and produce new education modules as required by clients
- To meet presentation standards agreed with clients

Desirable skills/experience

- Strong financial services background, including extensive UK pension knowledge relating to:
 - defined benefit schemes
 - defined contribution schemes
 - auto-enrolment
- At least 3 years experience in delivering face to face education to all levels of employees within an organisation from team members to executive staff
- Experience of developing technical presentations for delivery
- Keen interest in research of HMRC and regulatory guidelines and interpret them for other team members and Corporate clients
- Excellent influencing and interpersonal skills
- Clear and confident written and verbal communication skills with an ability to articulate complex ideas, concepts and solutions both internally and externally
- Proactive team player

Essential qualifications

Full FPC or equivalent

Desirable qualifications

- Diploma in financial planning – pension income options (JO5) or
- Diploma in regulated financial planning – Pensions and retirement planning (RO4)