




Your route to a rewarding career

Make the move today and join Ascot Lloyd
for a fulfilling career as a financial adviser



Ascot Lloyd
Financial Adviser Academy




“Financial Services offers a career path that can be hugely fulfilling – personally, professionally and financially.

At Ascot Lloyd, we will equip our Associate Advisers with the best training and resources possible to enable them to succeed.

We want to encourage talented individuals to get in touch to find out more about this career change opportunity with tremendous long-term prospects.”

Cath McVey

Ascot Lloyd HR Director



Looking for a new career path that's personally, professionally and financially rewarding?

Email us to register your interest.

adviseracademy@ascotlloyd.co.uk



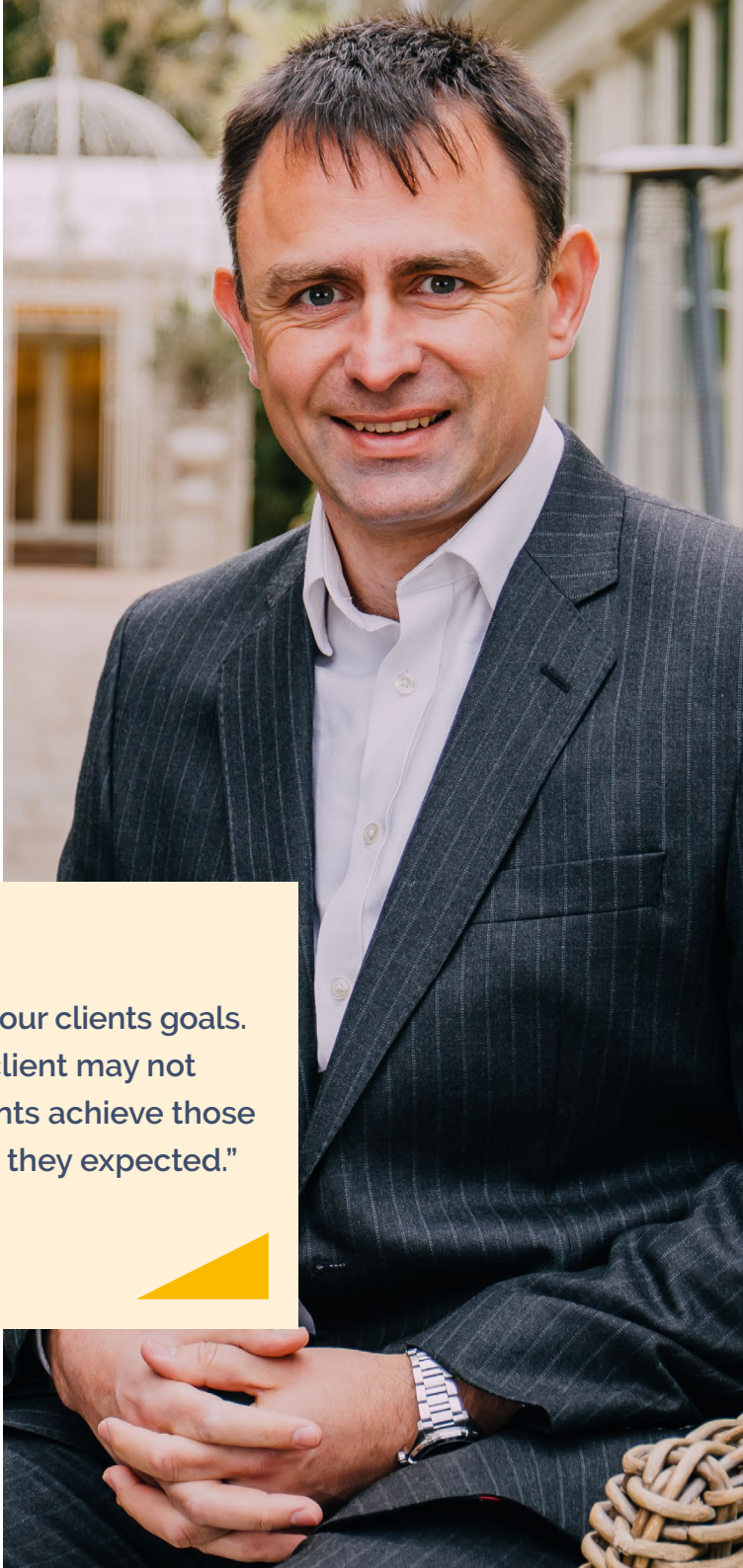
The role of an IFA at Ascot Lloyd

We build strong, trusted relationships and provide quality advice to help our clients achieve their financial goals.

As an Ascot Lloyd Independent Financial Adviser (IFA), you'll enjoy working with clients across all life stages, helping them plan for life's big moments. Professional knowledge and advice skills gained during our Academy training programme will equip you to advise across a range of areas such as retirement planning, mortgage protection and inheritance tax planning.

Relationship building skills are just as important as technical knowledge. Conversations vary every day as each client will have their own unique set of personal and financial circumstances.

As an Ascot Lloyd IFA, you'll be supported by experienced admin and paraplanning teams, tax specialists and a close network of peers.



"We have an in-depth conversation to understand and then prioritise our clients goals. We'll go through everything in detail, as we often help in ways the client may not have even thought about. The satisfaction comes from helping clients achieve those life goals, such as realising they're in a position to retire earlier than they expected."

Mark Sleeman
Ascot Lloyd IFA

A career with long-term prospects

Ascot Lloyd is one of the fastest-growing national financial advice firms

Our knowledgeable advisers support over 35,000 clients, delivering independent financial advice.

The need for financial advice is greater than ever

The cost of living and challenging national and international economic factors have increased money worries and confusion for millions of people.

We're hiring a new generation of customer focused advisers to help our clients achieve their goals

Our very own Financial Adviser Academy is cultivating the next generation of advisers and providing them with the tools for success.

Supporting the next generation in our industry

UK consumers already suffer from limited access to financial advice as the demand for good quality, independent advice outstrips supply. As advisers approach their retirement, there is a risk their knowledge and expertise is lost, which is why it is so important that our most experienced advisers help mentor the next generation of IFAs.





"I've been in the industry for over 30 years, I felt it was time to give a little bit back. Being a mentor gives me great satisfaction. Matt is brilliant to work with and I know he'll be a great adviser. He's got the drive, the energy and the passion."

Paul Tuson

Ascot Lloyd IFA and mentor to Matt Law



"The whole process of working with a mentor, alongside my studies, has been invaluable for me. Accompanying Paul on client visits meant I could see how he operated and enabled me to become more confident with client interactions. I now aspire to build trust with my clients the same way Paul has."

Matt Law

Recently qualified IFA, Ascot Lloyd



Why join the Ascot Lloyd Financial Adviser Academy?

Our commercially-minded training programme stands out in the industry, and here's why...

➤ Fully employed status from day one

Our Academy offers full-time employment, giving you immediate access to a generous rewards package including a regular salary, a company pension scheme and a generous holiday entitlement.

➤ An employed training route into a fantastic new career

Our structured 12-month Academy programme is designed to fully equip you with the qualifications, knowledge and commercial acumen for a career as an Ascot Lloyd IFA.

➤ Marketing and business development support

You'll receive marketing and business development support to help you build your client bank.

➤ Professional development

Your development won't stop after the 12 month programme. We train, develop and educate our advisers up to Chartered level and beyond.

➤ A supportive environment where everyone can achieve exceptional results

Ascot Lloyd cares about its people. We support colleagues to feel inspired, motivated and endorsed. You'll have access to our wide network of colleagues, including experienced advisers, paraplanners, administrators and tax specialists. You'll build a collaborative network within Ascot Lloyd, including course peers and an official mentor.



A structured path to your new career

Our programme will equip you with the regulated knowledge, advice skills and commercial acumen, which are the foundations for a successful career as an Ascot Lloyd IFA.



The 12-month training programme is delivered through a mix of face-to-face and remote meetings and training workshops, supplemented by a purpose built self-service digital workbook. The final part of the programme includes working with your clients, supported closely by our regional development consultants.

Tailored programme

We give you the time to study and pass the exams needed to attain the Diploma in Regulated financial planning. For anyone who has already attained part or all of the Diploma a bespoke learning path is put in place to attain additional qualifications to aid with your progression to Chartered level.

Mentor

To add some variety to your working week you'll have the opportunity to regularly meet with your mentor to learn more about the IFA role. The opportunity to observe client meetings and discuss advice scenarios further embeds the knowledge you've gained when you see it being put into practice.

Practical training

This programme includes plenty of time to practice your advice skills in a safe and constructive environment before setting out to meet with clients.

Our core values

We help clients preserve and grow their wealth through living our values of **trust**, **care** and **knowledge**. Our teams have the right combination of experience, knowledge and innovation to help clients build better futures.



TRUST

We listen to clients and our colleagues, we take time to understand their needs in order to build long-term relationships.

We aim to exceed expectations at every interaction.



CARE

We care about our clients' financial wellbeing and understand that each and every one is unique. We take a respectful and responsible approach to our impact on colleagues, communities, society and the environment.



KNOWLEDGE

Helping clients prepare for the future takes knowledge and insight. We are experts yet constantly seeking to improve. We train, educate, support and develop our people; helping them to be their best.



A more rewarding career awaits

Our **REWARDING** framework explains the key traits we look for in potential candidates...

- R**elationships The ability to build strong, long-term client relationships
- E**mpathy To truly understand your client's needs and goals
- W**ork ethic A desire and a determination to work hard to deliver the best service to your clients
- A**mbition To build a successful long-term career in financial advice
- R**esilience To positively work through challenges and embrace change
- D**rive Self-motivation and desire to succeed in your new career
- I**ntegrity In everything that you do
- N**urturing To build trust with your clients and support your colleagues
- G**rowth In your continued personal and professional development

The application process

1 Exploratory discussion about you and about the Academy

An opportunity for you to learn more about the structure of the Academy and for us to understand your motivations, strengths and ambitions.

2 Building a development plan

Self-awareness and self-motivation will be essential to successfully navigate through our Academy programme. We'll help you to build your development plan in readiness for the final interview.

3 Final interview

To include a competency-based interview, a presentation of your development plan and a client scenario role-play.



If you're interested in joining our Financial Adviser Academy, the first step is to get in touch.

To apply, please email us your CV along with an explanation of why you're applying and why you think you'd make a great financial adviser.

adviseracademy@ascotlloyd.co.uk



"In my role, I'm fortunate to speak with all of our applicants and work with them as they progress through our training programme.

I'm passionate about attracting and retaining diverse and talented individuals, who will bring their drive and integrity into the work we deliver for our clients."

Duncan Gregory

Head of Academy



“The Ascot Lloyd Adviser Academy gave me a structured training programme to pass my exams and the knowledge and tools to progress my career as an IFA. It also introduced me to a group of like-minded people on the same journey. We supported each other throughout and I have made amazing friendships that will continue now that we’re fully qualified advisers supporting clients.”

Ally Lee

Recently qualified IFA, Ascot Lloyd

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