

Graduate Trainee – Wells Gibson

Location: Prospect House, Prospect Business Centre, Gemini Crescent, Dundee DD2 1TY

Embark on a fulfilling journey with Wells Gibson as a Graduate Trainee in Financial Planning, taking on a pivotal role within our dynamic team and actively contributing to business development and client relationships right from the outset. This presents an outstanding opportunity to join our ambitious, forward-thinking, and inclusive office, offering a competitive salary and flexible development prospects.

As a Graduate Trainee in Financial Planning, you will undergo a structured training program designed to provide a comprehensive understanding of the financial planning profession. Successful completion of the Foundation Level will pave the way for specialisation in Financial Planning.

As a financial planning graduate trainee, you will enrol in our adaptable 5-year training program, where your responsibilities will progress alongside your personal growth. Beginning with administrative tasks in the initial year, completing the Foundation Level of the Scheme will open up the possibility to select your specialisation. Regardless of the chosen path, we are committed to assisting you in achieving Chartered & Certified Financial Planner Status.

Qualifications and Expertise

We are in search of candidates with a 2:1 degree or higher from a recognised UK university within the past 2 years. Additionally, we are looking for individuals who can:

- Execute tasks meticulously with a sharp eye for detail
- Analyse numbers and statistics
- Proficiently use Microsoft packages, including Word, Excel, and PowerPoint, with excellent IT skills
- Communicate effectively
- Work both independently and collaboratively with others

Why Choose Wells Gibson?

Wells Gibson stands as a multi-award-winning financial planning firm, holding esteemed titles such as Chartered Financial Planning Firm and Accredited Financial Planning Firm. Our commitment to ethical practices has earned accolades such as '**CISI Accredited Financial Planning Firm of the Year 2021**' and '**Citywire 2022 New Model Adviser Award winner**'. Joining our team means immersing yourself in a highly qualified group providing comprehensive, independent financial planning to high-net-worth clients with exceptional service.

Our Graduate Scheme is well-structured yet flexible, allowing you to shape your path as you accumulate more experience in the Financial Planning profession. Throughout this journey, you will be mentored by our Managing Director, Jonathan Gibson, Author of Purposeful Wealth and Host of the Purposeful Wealth Podcast, and our experienced team of financial planners and graduates, who have secured roles within the firm in the last 5 years.

We believe in a comprehensive approach to your development, ensuring exposure to client meetings and events. Our benefits package includes:

- Competitive annual salary
- Discretionary bonus scheme
- 30 days holiday (FTE)
- Additional day off for your birthday
- Generous group pension scheme and employee benefits scheme
- Professional Development Opportunities
- Study Leave
- Some flexibility in working arrangements
- Bi-annual staff development days
- Friendly and collaborative work environment
- Ethical business practices, environmentally friendly initiatives, and community engagement programs
- Conveniently located in the City of Dundee with free car parking

How to Apply

If you possess the experience and enthusiasm to contribute to our expanding firm, express your interest with confidence. Submit your CV and a concise cover letter to emma-jane.kerr@wellsgibson.uk, outlining why the opportunity appeals to you and how you would be a valuable addition to our team. We eagerly anticipate hearing from you.

Further information

Please visit www.wellsgibson.uk for insights into Wells Gibson's mission, values and service and the expertise of our team.