

REEVES
INDEPENDENT
— EST 1996 —

Discover Your Path to Success with Our Graduate Scheme



Invest in your future, join our team



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Welcome...

Reeves Independent is a specialist firm of Independent Financial Advisers which, for almost 30 years, have helped clients drive towards and achieve their retirement dreams.



Why choose Reeves?

Privately owned and managed

Financial Times Top 100 Advice Firm
Four years running

Rated 'Excellent' on Trustpilot
With 400+ reviews

North East Business Service Award winner 2022

Specialist investment advice firm

Our mission is to enable our clients to meet their retirement goals. We aim to deliver an industry leading service through our expert, reliable and client focussed employees.

Our philosophy is simple but effective: we offer realistic and practical solutions that add value to our clients' lives.



TRUST



HONESTY



INTEGRITY



CARE

We are always looking for talented individuals to help us achieve our goals and, if you have the desire to help drive the success of our business, we want to hear from you.

Overview

When you join our scheme, you will gain knowledge and experience in:



Financial Administration



Technical Services



Client Communications



Placement Rotation

Contracted Term:	Salary	Rotation Start Date
2 years Fixed Contract	<ul style="list-style-type: none">Starting salary is £22k/per annum.Increases attached to exam passes.Up to £28k/per annum.	January & July

- Your time will be divided over four six month periods and you will carry out roles in different departments across the business.
- You will gain a rounded experience across all areas of financial services over the two year period.
- You will gain an understanding of how the business works and an in-depth knowledge of our quarterly campaigns throughout the year.
- After your initial two years, depending on your performance and the business needs, you will have an opportunity to discuss a full time position within Reeves.

What will I achieve?

Level 4 Diploma in Regulated Financial Planning.

Exam support is offered through case study training, tutoring and online materials.





Exam Pathway

Rotation 1

RO1 EXAM

Financial Services, Regulation & Ethics
Revision

To develop knowledge and understanding of the financial services industry, including regulation, legislation and the Code of Ethics.

Rotation 3

RO4 EXAM

Pension and Retirement Planning -
Revision

To develop knowledge and understanding of and the ability to analyse pension and retirement planning issues.

RO5 EXAM

Financial Protection - Revision

To develop knowledge and understanding of and the ability to analyse financial protection planning issues.

Rotation 2

RO2 EXAM

Investment Principles and Risk - Revision

To develop knowledge and understanding of investment products and the application of the investment advice process.

RO3 EXAM

Personal Taxation Revision

To develop knowledge and understanding of the UK taxation system. The ability to analyse the taxation treatment of individuals and trusts during the investment advice process.

Placement

Financial Planning Practice - Revision

To allow trainee advisers to demonstrate their financial planning capabilities. It tests the practical application of technical knowledge and planning skills already gained.

Your time will be divided over four (rotational) six month periods and you will carry out roles in different departments across the business.

After successfully completing your two years with the business, you will have an opportunity to discuss a full-time role within Reeves Independent. You will have gained first hand experience to help you make an informed decision as to the route you wish to take in financial services.

Work Scheme Overview

1. Financial Administration

- Acquiring policy information from existing platforms.
- Submit advised business for new and existing clients.
- Compile forms to send to clients and then forward on to providers.

2. Technical Services

- Drafting advice reports on behalf of the advisers.
- Completing analysis on existing and proposed platforms.
- Whole of Market research.

3. Client Communications

- Liaising with clients.
- Working directly with client advisers.
- Assisting with client presentations.

4. Placement

- A final placement in one of the above seats - 1 to 3.
- Exposure to investment support.
- Focus on completion of your exam programme.
- Training and development.

Reeves Independent will fund your pathway to completing the Level 4 Diploma in Regulated Financial Planning, opening the doors for you in your IFA career. On the third month of joining the company, you will be enrolled in your first exam.



Team Introductions

Team: Operations Team

Role: Financial Administration

Job Purpose

- Acquiring policy information from existing platforms.
- Submit advised business for new and existing clients.
- Compile forms to send to clients and then forward on to providers.

Key Responsibilities

- Liaise with providers in order to obtain outstanding policy information.
- Submit business as instructed by our advisers for new and existing clients.
- Generate forms to send to clients to sign and then forward on to relevant providers.

Experienced Gained

- Understanding of what information we need for policies in order to complete accurate comparisons.
- Introduction to the kind of work we do for clients.
- Gaining experience on the importance of accurate data input.
- Gaining experience and knowledge on how to use our CRM system.

Team Introductions

Team: Operations Team

Role: Technical Services

Job Purpose

- To assist in ascertaining how suitable proposed advice is by completing analysis on products, charges and fund performance.
- To assist in the completion of 'Suitability Reports' which are used for delivering advice to clients.

Key Responsibilities

- Completing pension analysis.
- Completing fund performance comparisons.
- Complete skilled reading & data input.
- Assessing suitability of advice.
- Completing cost comparisons.
- Assisting in overspill of admin tasks when needed.

Experienced Gained

- Gaining more technical knowledge on pensions and wealth management.
- Knowledge of compliance within a Financial Conduct Authority regulated company.
- Learning how and what to analyse when comparing pension and investment providers.
- Learning how to compile an advice report.

Team Introductions

Team: Operations Team

Role: Client Communications

Job Purpose

- To ensure clients are updated in line with our campaign programme by having meaningful phone conversations.
- To answer client queries and act as a point of contact.
- Assisting with the delivery of quarterly campaigns.

Key Responsibilities

- Completing client campaign calls.
- Develop great relationships with clients.
- Work closely with financial advisers.
- Delivering information to clients.
- Be on hand to answer client queries.

Experienced Gained

- Gaining technical knowledge on all areas of finance.
- Direct communication with clients.
- Ability to explain potentially complex financial instruments and practices in a client-friendly manner.

Placement



Once you have completed your 18 month period within the three departments, you will continue to develop and excel in one of the departments we feel you performed well.

- Financial Services
- Technical Services
- Client Communication

The final six-month sitting will give you exposure to our investment team. Not only will this final seat enable you to continue your training and development, but it will also ensure you complete your exams. Reeves aim to empower you to become a highly skilled, diligent and knowledgeable graduate that will not only succeed at Reeves, but in the financial services sector.

- Investment Services
- Continued Training & Development
- Final exam help & support

Let's Chat...

Apply Now

Simply scan the QR code to kickstart
your career in financial services



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