

# JOB ROLE

## FINANCIAL PLANNING MANAGER

**Location:** Remote, with occasional travel to our Berkshire office.

**Full-time | Competitive salary + benefits**

Are you an ambitious leader with a background in financial planning? Are you ready to mentor a team, drive growth, and shape the future of financial planning at Chester Rose?

We're looking for a **Financial Planning Manager** to lead our planners, oversee paraplanning, and ensure smooth collaboration across the business. This is an exciting opportunity for someone who wants to get stuck in, make an impact, and take ownership in a high-growth, client-first environment.

### What you'll be doing

You'll lead and support our planning function, including:

- Leading, mentoring, and developing a team of financial planners.
- Overseeing paraplanning (via the Head of Paraplanning) and working closely with admin teams.
- Driving business distribution and supporting planners with client acquisition and retention.
- Acting as a spokesperson for planners, representing their voice to senior leadership.
- Contributing directly to business writing, bringing strong experience as a Financial Planner.

### What you'll bring

- Proven track record managing financial planners.
- Chartered (or close to it), with strong holistic planning experience.
- Skilled in cash flow modelling and confident working alongside technical paraplanners.
- Experience as a Financial Planner, with an established client book highly desirable.
- Someone ambitious, hands-on, and ready to tackle challenges head-on.

### About Chester Rose

Chester Rose brings together independent Chartered financial planning practices who believe in more than just good advice — we believe in helping people bring their personal vision to life.

Every client is different. That's why we craft tailored, structured financial plans designed to grow and protect wealth for today and future generations. We pride ourselves on our client-first culture, strong collaboration across teams, and an unwavering commitment to quality and care.



### Why join us?

- Lead a high-performing team and shape the direction of our planning function.
- Influence business distribution and contribute directly to growth.
- Be part of a high-calibre, values-led team with a commitment to excellence.
- Thrive in a supportive culture where your input genuinely matters.