

FOR YOUR FUTURE



Incredible careers in Financial Planning

“ Whether you’re looking at changing direction or just starting out, a career in financial planning can be exciting, rewarding and as flexible as you want it to be. At Franklyn we are keen to encourage the right people to forge their own career path in the profession, and to make it easier for them to realise their ambitions. ”



Andrew Chatterton BA (Hons) APFS
Managing Director

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Who we are and what we do.

Franklyn was launched in 1999 by Andrew Chatterton, who is still the main shareholder along with many members of the team who are also now shareholders in the business.

Based in Congleton, Cheshire, we promise each client a transparent and thorough service, creating bespoke financial plans designed to achieve individual goals.

Finances touch every aspect of life and we support our clients in all areas of their plans from pensions and investments to protecting against risk. Ultimately, we are helping our clients secure their financial future, we take care of it all.

Our values.

Demonstrating Integrity

At our core, we uphold the value of acting with the utmost integrity. We firmly believe that Franklyn can be a force for positive change. This belief is reflected in our unwavering commitment to charitable endeavours, social responsibility, ethical investment planning, and dedicated service to our clients.

Acting with Courage

We firmly hold the belief that true success is born from confronting the unvarnished truth, regardless of its nature. We do not shy away from taking responsibility, and we consistently make decisions guided by our ethical compass, even when faced with challenging circumstances.

Working Together

We recognise that significant achievements seldom occur in isolation. We view sound financial planning as a collaborative effort, involving both our team members and the partnership between you and us. Together, we strive to create a comprehensive financial plan that aligns with your goals and aspirations.

Pursuing Excellence

Our clients entrust us with their financial well-being, and we honour that trust each day. We are dedicated to delivering outstanding client service characterised by a warm and professional demeanour, coupled with a depth of expertise that consistently meets and exceeds your expectations.

Always Improving

The field of financial planning is in a constant state of change. To serve our clients best, we remain committed to staying at the forefront of industry knowledge, expertise, and service quality. Our dedication to continuous improvement helps to ensure that we provide you with the most up-to-date and effective financial solutions.



FRANKLYN

Established 1999 in Congleton, Cheshire.

Franklyn are set to celebrate our 25 year anniversary.
You will be joining a company with a rich heritage and
steadfast ambition for further success.



Bedtime Stories
with Sharks
FRANKLYN
No. 1 Growth Firm

#RUN 4 PATRYK

FOR THE FUTURE
Hello

GET YOUR OWN...
TAX YEAR END...

together

Our Promise To You

Our **Franklyn People Promise** explains the 10 key ways that our people are valued, empowered and rewarded for the contribution they make to Franklyn's success.

- 1 Meaningful Impact**

At Franklyn, you'll have the opportunity to make a real difference in the lives of our clients. You'll work closely with individuals and families to help them achieve their financial goals, help to secure their future, and build generational wealth. Your work will have a lasting impact on the financial well-being of our clients and their families.
- 2 Professional Growth**

We are committed to helping you grow both personally and professionally. We offer continuous learning and development opportunities, including access to industry-leading training programs, certifications, and mentor-ship from seasoned experts in the field. Your growth is our growth.
- 3 Collaborative Environment**

We foster a collaborative and inclusive work culture where your ideas and input are valued. You'll be part of a team that collaborates across disciplines, leveraging the collective expertise to provide the best solutions for our clients. Together, we create an environment that encourages innovation and excellence. Take a look at our [Franklyn Magazine](#) for more about our unique culture.
- 4 Work-Life Balance**

We believe in the importance of work-life balance. Our flexible work arrangements and supportive policies allow you to maintain a healthy equilibrium between your professional and personal life, helping to ensure your well-being and long-term success.
- 5 Excellent Remuneration**

Your hard work and dedication deserve to be rewarded. We offer competitive compensation packages that include salary, performance-based bonuses, and a company share scheme all designed to recognise and appreciate your contributions.
- 6 Cutting-Edge Technology**

We invest in cutting-edge technology and tools to empower you in providing the best services to our clients. You'll have access to state-of-the-art systems, processes and technology to make your work more efficient and effective.
- 7 Client-Centric Approach**

Our client-centric approach is at the heart of everything we do. You'll have the support and resources to focus on building strong client relationships and delivering personalised solutions tailored to their unique financial needs. Visit our website to watch our [Client Stories](#) to see how we make a difference.
- 8 Ethical and Responsible Practices**

We are committed to ethical and responsible financial practices. Joining us means aligning with a company that prioritises integrity, transparency, and ethical behaviour in all aspects of our work.
- 9 Community and Charity Support**

You'll have opportunities to get involved in meaningful community and charity initiatives, such as our prestigious annual Charity events - the Summer Swing Golf Day and the Winter Waltz Evening Dinner - which have helped us raise over £1.5 million for charitable causes. Franklyn are passionate and committed to make a positive difference beyond the office walls.
- 10 Security and Stability**

With a strong financial foundation and a history of organic growth, we offer career stability and security. You can build a long and rewarding career with us, supported by a company that values its employees as its greatest asset. Franklyn are set to celebrate our 25 year anniversary in 2024, you will be joining a company with a rich heritage and steadfast ambition for further success.



FRANKLYN

For the journey

THE FRANKLYN WAY

What it takes to succeed...

Whether embarking on your first role at our Financial Advice Academy or if you're a seasoned Financial Planner seeking a fresh opportunity, cultivating a successful career at Franklyn hinges on your demonstration of **ambition, drive, and commitment**.

Your career path resembles a journey, complete with notable achievements and formidable challenges. At Franklyn, we will provide you with guidance and support, but ultimately, it's you that determines the speed and success of your journey, as well as the enjoyment you derive along the way.

Ambition, drive, and commitment serve as the driving forces that underpin both personal and professional triumphs, motivating you to establish and relentlessly pursue goals with resolute determination.



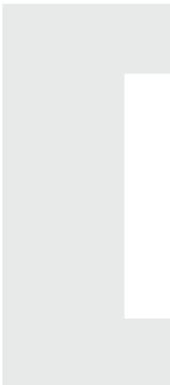
AMBITION

Ambition provides the vision and aspiration to reach for new heights, always striving for excellence.



DRIVE

Drive fuels the relentless effort needed to overcome obstacles and challenges along the way.



COMMITMENT

Commitment ensures the resilience to stay dedicated to your goals.

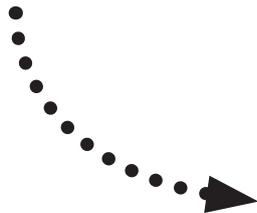
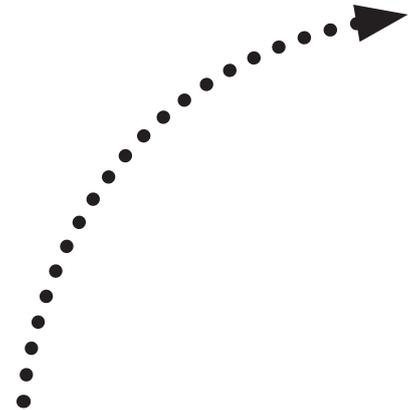
Your career choices.

At Franklyn we aren't like other Financial Advisers, we have a unique approach that delivers an exceptional client experience.

Just like you, our clients are on a journey too and at different stages they require different support. Our teams are formed to offer that support and are led by a Financial Adviser, Financial Planner or Wealth Manager.



INDIVIDUAL FINANCIAL ADVICE



This service tier is for when we distinctly and promptly outline the clients requirements, typically necessitating guidance on an individual solution or product category.

Clients can expect a professional and efficient service facilitated by different members of the Franklyn team dependent on their request.

Delivered by: Financial Adviser

Supported by Paraplanner / Mortgage & Protection Adviser / Practice Support Team

The Roles: What's the difference?

Financial Adviser

This role requires you to complete formal training and be certified to give financial advice on key products.

Financial Planner

This is a more experienced role where you are able to give detailed planning to clients across a range of services.

Wealth Manager

This is an advanced role for experienced professionals that can manage clients with complex financial needs.



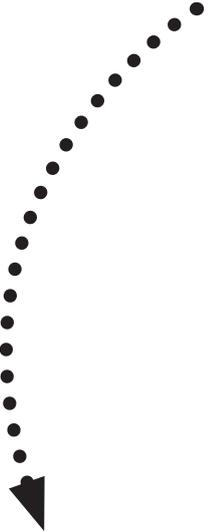
HOLISTIC FINANCIAL PLANNING

This service tier is for clients whose circumstances, needs, and objectives require a more comprehensive and meticulous approach.

Clients can expect a close collaborative and ongoing relationship with their own Personal Financial Planner, who will build a tailored plan based on the clients short, medium and long term objectives.

Delivered by: Financial Planner

Supported by Paraplanner / Mortgage & Protection Adviser / Practice Support Team



SPECIALIST PRIVATE CLIENTS

This service tier typically refers to individuals that have unique needs and higher levels of wealth or complexity in their financial affairs, which necessitate a more specialist and customised approach.

Clients can expect a Chartered Financial Adviser to act as their financial concierge and build and manage a team of professionals suited to their needs.

Delivered by: Wealth Manager

Supported by Private Clients Team / Chartered Financial Planner / Paraplanner / Mortgage & Protection Adviser / Practice Support Team



Apply for a Financial Adviser position at Franklyn.

As a Financial Adviser at Franklyn, you will work closely with your clients to build a bespoke financial plan, helping them to reach their long-term objectives whilst considering and planning for potential risks that could affect their strategy.

You will be joining Franklyn at an extremely exciting time as we celebrate our 25th Anniversary and enjoy our next phase of growth supporting more clients than ever to enjoy financial well-being. You will enjoy the support of a great team of over 50 professionals, alongside the backing of a FTSE 100 company to deliver the products within our financial plans.

About Franklyn

Franklyn is a special company, we truly believe in giving back to our community, our annual Christmas gala dinner, the Winter Waltz, and charity golf day, The Summer Swing, have raised over £1.69 million for some incredible causes. We are also very active in the sport community, as key sponsors for rugby union side Sale Sharks and Stoke City Football Club. Our bi-annual Franklyn magazine gives a great insight into life at Franklyn and shares some of the great success stories from our clients, news and events from our wider community. In summary, if you are a Professional Financial Adviser who is considering taking a new direction in your career – there is no better home for your talents than at Franklyn, with our unwavering support – you can truly thrive.

Job Summary

As a Financial Adviser at Franklyn, your primary role is to offer expert financial guidance and tailored advice to clients, assisting them in achieving their financial goals through informed decision-making and strategic planning.

Responsibilities

Client Consultation: Conduct comprehensive consultations with clients to understand their financial aspirations, assess their current financial status, and determine their risk tolerance and preferences.

Financial Analysis: Perform detailed analysis of client's financial circumstances, including income, assets, liabilities, and retirement plans, to create personalized financial strategies.

Regulatory Compliance: Ensure all advice and recommendations provided comply with UK financial regulations and standards, including those set by the Financial Conduct Authority (FCA).

Investment Advice: Recommend suitable investment options, considering the specific needs and risk profiles of clients, while staying abreast of the UK investment landscape.

Pension Planning: Provide advice on pension schemes, retirement planning, and tax-efficient strategies in accordance with UK regulations.

Estate Planning and Insurance: Offer guidance on estate planning and insurance products tailored to protect clients and their families in the UK's regulatory framework.

Client Relationship Management: Build and maintain strong client relationships, providing ongoing support, regular portfolio reviews, and updates on relevant market developments.

Continuous Education: Stay updated on changes in UK financial laws, market trends, and products to ensure the advice provided remains current and valuable.

Requirements

Qualifications: Minimum Diploma in Financial Planning.

Knowledge: In-depth understanding of the UK financial market, investment products, pension regulations, tax laws, and compliance standards.

Communication Skills: Excellent interpersonal and communication skills to effectively convey complex financial concepts and recommendations to clients.

Analytical Skills: Strong analytical abilities to assess clients' financial situations and formulate appropriate financial plans.

Ethical Standards: Adherence to the FCA's ethical standards and commitment to delivering fair and transparent financial advice.

Relationship Management: Ability to build rapport with clients, identify their needs, and effectively promote suitable financial products and services.

Key details

An exemplary approach to service, in line with the Franklyn philosophy of putting the client at the centre of everything we do.

Location – Cheshire - flexible working available with offices in Congleton, Sandbach, Crewe, Alsager and Newcastle.

Salary – Salary negotiable with an uncapped bonus. OTE in the region of £100,000.

What's in it for you?

Life at Franklyn comes with the following benefits:

- Uncapped bonus
- Leads provided by the business
- Contributory pension scheme (after 3 months of continuous service)
- Death in service (after 6 months of continuous service)
- Critical illness cover and income protection (after 2 years of continuous service)
- Private medical insurance (after 5 years of continuous service)
- 29 days holiday inclusive of any bank holidays
- Quarterly team events
- Support with professional development if desired, such as further qualifications



How to Apply

You can apply directly for this role on the [franklyn.co.uk](https://www.franklyn.co.uk) website, or for a confidential talk about a career with Franklyn, you can reach out directly to Gemma Tunstall our Practice Manager.

Call 01260 291825

Email gemma.tunstall@sjpp.co.uk



FRANKLYN [Financial Management]

Get in touch to talk about your amazing career with Franklyn.

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