

Pacem *Advisory*

Financial Planning Summer Intern Role

We help high net worth *families*,
affluent retirees and entrepreneurial
business owners find *clarity* and *vision*
in their business and personal finances,
by providing strategic **wealth**,
accounting and tax advisory.

Where we *started...*

2017

2026

5 People

28 People

- **Team of 28** including Management, Financial Advisory and Accounting & Tax teams.
- 2 x Accounting & Tax *acquisitions*
- 1 x Financial Advisory *acquisition* of Redrock Financial in 2019 (inc. £40 million)
- **95%** Client Retention rate from acquisitions.
- 5 x *Employer & Business Awards*
- **395** Financial Advisory clients
- **202** Accounting & Tax clients.

For Business - For Life

We help *high net worth families, affluent retirees and entrepreneurial business owners* find clarity and vision in their business and personal finances, by providing strategic **wealth, accounting and tax advisory.**

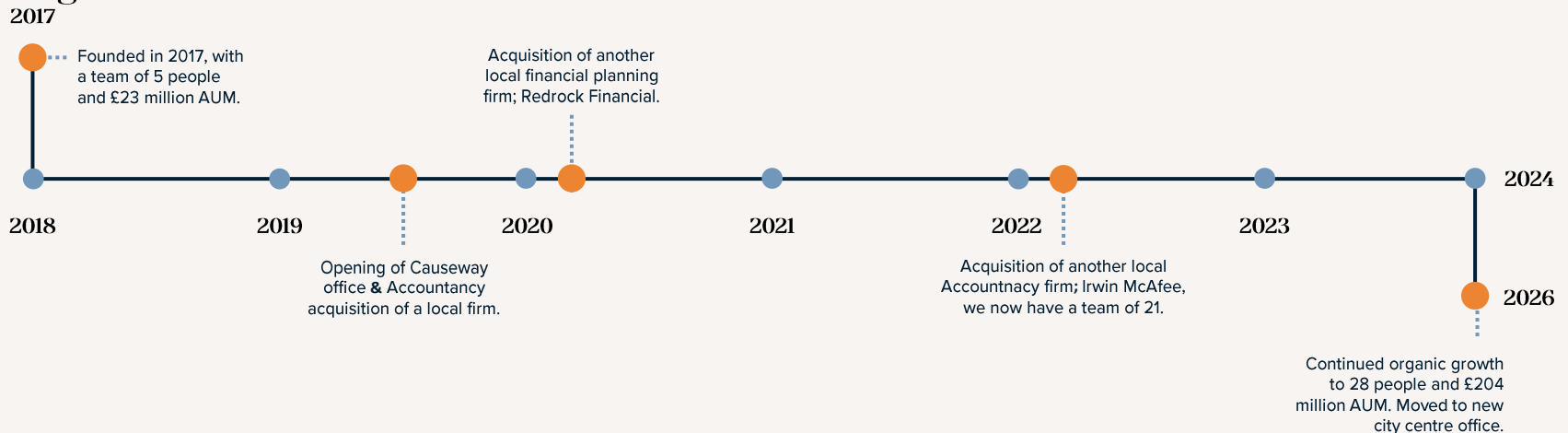
Our 4 Unique's:

- Wealth, Tax & Accountancy as one advisory service
- Tech driven business that allows our team to focus on clients & not back-office work
- Exceptional Customer Service
- Credible technical knowledge to work with clients North & South of the border.

Who we are...

Who we are...

Pacem is a boutique firm bringing together **Financial Planning, Accountancy, and Business Advisory** in a truly integrated way. We pride ourselves on being people-focused, building close, long-lasting relationships with our clients and supporting them at every stage. Just as we guide our clients, we're committed to helping our team realise their potential through **mentoring, coaching, and professional growth**. Our culture is built on **well-being, collaboration, and a supportive ethos** that reflects our values and drives us forward together.



- Our team has grown from 5 people to 28 people.
- In our Financial Planning business our client Assets under Management have grown from £23 million in 2016, to £204 million at present.
- We have over 600 clients across the firm.
- Pacem won East Belfast's 'Employer of the Year' Award in 2020 & 2022 and the 'Best Wellbeing in the Workplace' Award at the Irish News Workplace & Employment Awards 2024.
- Pacem focuses on working with small to medium sized business owners to provide a coordinated financial plan to provide for both their personal and business needs.

Pacem Workplace *Awards...*

Best Place to Work

The Irish News Workplace & Employment Awards 2025

Best Wellbeing in the Workplace Strategy

The Irish News Workplace & Employment Awards 2024

Employer of the Year

Eastside Awards 2022 & 2020

Business Growth

Eastside Awards 2022



Accountancy & Tax Advisory...

Accountancy Essentials

Real-time, bespoke, personal and precise... Our bookkeeping, compliance and accountancy essentials service provides clients with **clarity, insight and peace of mind.**

- Cloud Accounting Package
- Payroll and Pension
- Full bookkeeping
- Year end accounts
- Personal Tax Planning
- VAT returns
- Monthly Management reporting
- Tax Investigation Service

Business Advisory

From pre-start to exit... providing timely information, **unmatched expertise** and diligent insight where and when it matters... we **add value way beyond the compliance work.**

- Specialist Start up advice for new businesses
- Cashflow Forecasting and Budgeting
- 'What if' Scenario Planning
- Professional Tax Advice
- Industry Specific Expertise
- Succession Planning
- Business Valuation
- Strategy and Growth Planning

Our Core Values...

Good to Be Around

- Good to Be Around
- Easy to get on with.
- Good to be around, even under pressure.
- Genuinely care about people, takes time to talk to people.

Enthusiasm – gets stuck in

- Will do whatever is required.
- Determination to see things through.
- Initiative & commitment to develop.
- Appetite to learn & take on new challenges.

Growth mentality – trying to push the boundaries

- To innovate and evolve, looking for the next opportunities.
- Never satisfied and always trying to improve.
- Purpose in our work and our career development.
- Ensuring we all retain the bigger picture and are asking 'why?'

Do things the right way, rather than the easy way

- Reliability; complete assurance something will be done and be done right.
- Great organisational skills, attention to detail, and the ability to pull things together.
- Diligence and quality are core to delivering the client service.

Proud of Pacem... and everything that we do individually and collectively

- Everything matters; we take pride in:
- Our clients – the work they do and our relationships with them
- Our team and culture
- Our office and its environment
- Our communications (written and verbal)
- Our social impact and outreach activity
- Our processes

Always thinking about the client

- We appreciate the opportunity and the business our clients create for us.
- We're here to make their lives easier.
- Working hard for our clients - going over and above expectations.
- Having an inquisitive and questioning approach to client work.
- Focusing on the clients' needs and wants and not what suits us best.

Market Leading Employee Benefits: Pacem *Good Job* Strategy

Remuneration

- Competitive Salary
- 5% Pension Contribution
- Individual Performance Bonus Eligibility
- Client Referral Bonus
- Recruitment Candidate Referral Bonus



Added Value Benefits

- Additional Loyalty Days – 20 Days Holidays increasing by 1 Day up to a maximum 5
- 9 Statutory Days
- 5 Closure Days
- Income Protection
- Life Cover
- Working from Home Allowance
- Enhanced Occupational Sick Pay Scheme
- Enhanced Parental Leave



Work / Life & Wellbeing

- Flexi Time System – Flexible Start/Finish Times
- Hybrid Working
- Sabbatical (4 Weeks at 4 Years Service)
- Unum Health Services – Remote GP, Physio Appt Access
- Help @ Hand Wellbeing App
- Team Wellbeing Initiatives
- Team Events



Career Growth & Progression

- Financial Support for Training/Qualifications relevant to role development
- Management Mentoring
- Annual Career Progression Meetings
- 1:1 Coaching
- EQI Emotional Intelligence Skills Development



**Please note that eligibility for some of the benefits require successful completion of probation or progression from an internship / placement into a permanent role*

...The *Role*

Role *Details...*

Financial Planning Summer Internship Role

- **Location** – Based at Pacem Advisory Offices, 2-10 East Bridge Street Belfast
- **Hours** – 36.5hpw
- **Salary** – Competitive Salary
- **Reports to** – Group Operations Manager
- **Closing Date** – 12pm on Friday 17th April 2026
- **CVs with a cover letter should be sent to Frances.neely@pacem-advisory.com**
- ***As we are currently recruiting for a number of positions, please state 'Financial Planning Summer Intern' as the role you are applying for in your cover letter.**

Long-Term Objectives

As the business is constantly growing, we will need valued members of the firm to help us deliver the best service to our clients and to help continue with the growth of the business.

The *Role*...

The successful candidate will work as an intern with our Advisers and Paraplanning team to provide professional, efficient and compliant financial planning services to our clients. It is expected that you will be consistently accurate in your work, be able to work on your own initiative and maintain the high level of professionalism that our clients expect.

Working within our team will require you to be hands on in all areas so you will also be expected to answer telephone calls and deal directly with clients. The ability to communicate in a professional and knowledgeable manner both written and oral will be important.

Key *Role Areas* ...

*Financial
Planning Analyst
support*

*Platform &
Servicing*

**Office
operational
administration**

Main Duties Overview

The main duties focus on supporting the team to deliver a professional service that helps the business to provide clients with clarity, insight and peace of mind.

Being The main duties focus on supporting the team to deliver a professional service that provides clients with clarity, insight and peace of mind. Dependent upon business need the role may include working across either the Platform & Servicing team or Planning team. This will include:

- Working with one of the firms Adviser's to provide our ongoing annual review service to our clients.
- Support the advice and paraplanning team in providing clients with their Strategic Financial Plan, providing Financial analysis and projections, Investment Analysis, Tax and Estate Planning and Contingency Advice.
- Support the team in client portfolio management and processing on our investment platforms.
- Manage client databases on our back office system Intelligent Office.
- Undertake office admin to support team including excel analysis, database updating, file scanning and reception cover if required.
- Working within our Platform and Servicing Team to implement any changes following our ongoing annual review or Strategic Financial Plan service to our clients.
- Working with the team to ensure there is a seamless transition from the Planning team and that all actions are completed in a timely manner and communicated back to the client.
- Ensure fund switches / rebalances / top ups / withdrawals are carried out accurately and within company timescales.

Detailed *Duties*...

Working as part of our team to deliver and implement an exceptional service to all clients:

- Follow a strict compliant documented process on how the firm implements our financial planning advice to meet FCA regulations.
- Contact financial institutions and investment providers to assess new client's current holdings and portfolios.
- Create and maintain accurate client records on back-office systems, platforms and any other IT systems e.g. cashflow & risk profiler
- Prepare client documentation and correspondence post meetings as per business processes
- Check accuracy and completeness of new business documentation
- Ensure that all business applications are processed accurately and efficiently, in a compliant manner, to the firm's standards
- Ensure all supporting documentation is maintained as per company procedures
- Record and reconcile fees
- Ensure all work is followed up promptly in line with company standards
- Liaise with product providers to ensure timely and accurate responses to clients (progress chasing)
- Send Letters of Authority and gather accurate information
- Obtain illustrations and application forms
- Production of portfolio valuations
- Ensure fund switches / rebalances / top ups / withdrawals are carried out accurately and within company timescales
- Ensure action points resulting from client meetings get diarised and dealt with in an appropriate timescale
- Other duties as directed by management

Detailed *Duties* ...

Working as part of our team to deliver Strategic Financial Planning Process to New Clients:

- Undertake analyse and cashflow planning of client's current situation.
- Research potential financial products and portfolios to meet with client's needs.
- Work with Financial Adviser to build the clients Strategic Financial Plan and take responsibility for preparing the report for presentation at the client meeting.
- Once the plan is agreed with the client, create an implementation plan and timescales to ensure client advice is implemented efficiently.
- When all advice complete review file with Financial Adviser to ensure all paperwork and advice completed compliantly.
- Supporting the Financial Advisers to provide our clients with the ongoing client review and management process:
 - Work with Financial Adviser to prepare annual review for clients Strategic Financial Plan and prepare report for presentation at client's review meeting.
 - Assess and analyse performance of client's portfolios over the long term.
 - Implement any subsequent changes to client's investments and other financial assets after client review.
 - Provide ad hoc valuations and information on clients' portfolios.
 - Provide ad hoc administrative management of all clients' assets and portfolios as required.

Requirements...

We require the successful candidate to have:

- Be due to commence Second Year or Final Year of your degree in September 2026 in one of the following subjects - **Finance & Investment Analysis, Accountancy or Business Studies combination.**
- Have a strong working knowledge of Microsoft Office packages.
- Have skills in preparing client reports, writing competently, using diagrams, charts and tables to express the complex financial concepts in a simple and understandable manner for clients.
- Have a confident telephone manner and be able to speak directly to external organisations to obtain client and portfolio information. Also, to understand procedures these organisation require Pacem to follow to manage our clients' portfolios and assets effectively.
- Plan and prioritise their own workload and work well as part of our team.
- Have good time management skills.
- Be diligent in their work at all times.
- Have the ability to work and think independently to solve problems as they arise.
- Excellent spoken and written communication, and self-presentation when interacting with clients.
- Strong organisational skills, the ability to plan, prioritise and multitask.
- Be professional, energetic and dependable.
- Strong Attention to detail.
- Ability to work with a high level of confidentiality and sensitivity.

Contact Us...

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