Pacem

FINANCIAL ADVISORY

Financial Planning Analyst Graduate Role

Pacem

As one of Northern Ireland's leading Financial Advisory Firms, Pacem is a boutique Practice which offers a unique Financial Planning & Accountancy Business Advisory service. As a company we are people focused and we have a very close relationship with our clients. Our culture is that we want all team members to realise their potential and we provide this through mentoring and coaching. We promote employee well-being and a supportive team working ethos in line with company values and objectives.

Founded in 2016, with a team of 7 people and £23 million Assets under Management

Opening of Causeway office & Accountancy acquisition of a local firm

Acquisition of another local financial planning firm; Redrock Financial

Organic and acquisition growth, we now have a team of 28 and £178.5 million Assets under Management

2016	2017	2018	2019	2020	2021	2022	2023	2024

- Our team has grown from 7 people to 28 people.
- In our Financial Planning business our client Assets under Management have grown from £23 million in 2016, to £178.5 million at present.
- We have over 500 clients across the firm.
- Pacem won East Belfast's *'Employer of the Year'* award in 2020 and 2022. Best Wellbeing in the Workplace - 2024
- We're delighted to be shortlisted for 'Family Business of the Year' at the Belfast Chamber Business Awards 2023
- 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

Pacem Financial Advisory

- A client often comes to us with what they feel is a pressing problem e.g. a pension issue.
- While trying to solve this issue with them, it's our job to work out the range of financial issues they face in life which they maybe haven't realised exist yet or they are not yet focusing on.
- Once discussed, we prepare a coherent plan to provide clarity and direction to provide peace of mind about their future.
- As part of our ongoing service, we review these objectives and issues on an annual basis.

The value we deliver

Total peace of mind about your finances and your future.

- Secure
- Relaxed
- Confident

Your problem
e.g. a pension issue

The real problem

Financial and emotional uncertainty

Planning process

- Personal
- Friendly
- Thorough

Your coherent plan

- Clarity,
- Direction,
- Well-organised finances

Our on-going service

Pacem Financial Advisory

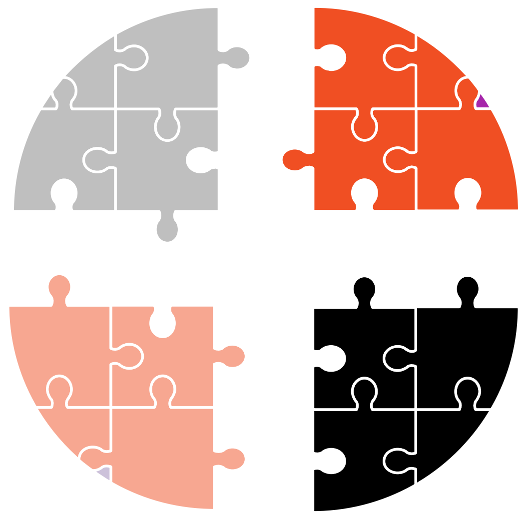
- In each client's plan, there are 4 key areas of financial advisory, as outlined below.

Financial plan

Lifetime cashflow planning:
a) Are your assets sufficient to meet your goals?
b) What choices do you have?
c) What trade-offs will you make?

Contingency plan

Planning for the known unknowns:
a) Long-term care
b) Premature death
c) Illness



Investment plan

Your current portfolio:
a) Suitable?
b) Well structured?
c) Understandable?

Tax plan

Are your affairs tax efficient?*
a) Tax reliefs maximised?
b) Asset location effective?
c) IHT planned for?

* We only work within the common and wholly acceptable tax efficiency planning opportunities afforded by HMRC

Pacem Accounting & Tax Advisory

Pacem also has an Accounting & Tax Advisory department. Our main services in this area are summarised below.

Accountancy Essentials	***Business Advisory***
Real-time, bespoke, personal and precise... Our book-keeping, compliance and accountancy essentials service provides clients with **clarity, insight and peace of mind.**	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**.
Cloud Accounting Package	Cashflow Forecasting and Budgeting
Payroll	Risk Management
Full book-keeping	'What if' Scenario Planning
Year-end accounts	Professional Tax Advice
Personal Tax Planning	Industry Specific Expertise
VAT returns	Succession Planning
Monthly Management reporting	Business Valuation
Tax Investigation Service	Strategy and growth

Support for Local Start up businesses

Over the last few years we have been heavily involved in programmes with early stage growth businesses. Pacem is a leading provider of business and accounting advisory services to early stage growth businesses in Belfast.

Pacem's Core Values

Core Values	
Good to Be Around	**Do things the right way, rather than the easy way**
• Easy to get on with. • Good to be around, even under pressure. • Genuinely care about people, takes time to talk to people.	• 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.
Enthusiasm – gets stuck in	**Proud of Pacem and everything that we do individually and collectively**

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

Growth mentality – trying to push the boundaries	**Always thinking about the client**
• 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?'	• 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.

Who We Are | Role details | The Role | Criteria for Role | Contact Us

Why we are a great place to work

- Great team culture & strong values
- Passionate about helping clients create the outcomes they want in business life
- Engaging our team to grow and reach their potential by creating opportunities and a balance of support and challenge.
- Helping the team like the life they want around work
- Exposure to a range of business areas, empowerment to collaborate on impactful projects and develop new skill sets
- Feeling valued through outstanding employee benefits and a great working environment and memorable team events.

Our Purpose & Our Philosophy

- To lead the industry in bringing clarity and vision to the business and financial lives of business owners across Ireland, providing a remarkable, innovative service!
- For our team to have a meaningful, challenging environment to work, develop, grow and contribute, bringing value to their lives!
- In achieving this, we believe we can make an Impact on our community, the sustainability of our planet and our environment, our people and wellbeing and we can help to empower enterprise.

What's the real opportunity here?

- Being a key team member supporting the Financial Planners, Directors and wider team in a growth orientated business.
- Be instrumental to designing and delivering Pacem's bespoke client experience

Market Leading Employee Benefits – Pacem Good Job Strategy

Remuneration

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

Added Value Benefits

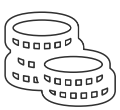
- ✓ Additional Loyalty Days – 20 Days Holidays increasing by 1 Day up to a maximum 5
- ✓ 9 Statutory Days
- ✓ 5 Closure Days
- ✓ Income Protection & Life Cover
- ✓ Enhanced Occupational Sick Pay Scheme
- ✓ Enhanced Parental Leave

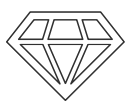
Work / Life & Wellbeing

- ✓ Flexi Time System – Flexible Start/Finish Times
- ✓ Hybrid Working
- ✓ Work Well Fridays Trial
- ✓ 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
- ✓ Conferences
- ✓ Management Mentoring
- ✓ Annual Career Progression Meetings
- ✓ 1:1 Coaching
- ✓ EQI Emotional Intelligence Skills Development





**Eligibility for some benefits is based upon successful completion of probation period*

Financial Graduate Role

- **Start Date:** June 2025
- **Location** - Based at Pacem Advisory Offices, Belfast. Flexible working arrangements including working from home.
- **Salary** – £25,000.00
- **Hours** – 36.5 hours per week.
- **Reports to** – Group Operations Manager
- **Closing date: Friday 23rd May 2025 at 12pm**
- **To apply, please send your CVs with a cover letter to** Frances.neely@pacem-advisory.com

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 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.

Main Duties Overview

The main duties focus on supporting the team to deliver and implement a professional financial service that provides clients with clarity, insight and peace of mind. This will include:

- 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.
- Support the team in client portfolio management and processing on our investment platforms.
- Ensure fund switches / rebalances / top ups / withdrawals are carried out accurately and within company timescales.
- Supporting the Advisers through implementation and servicing of clients. Working closely with the planning team to ensure plans are correctly implemented.
- Understanding financial plan and analysis into an action plan for implementation.
- Accurate updating of 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.

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

Requirements

We require the successful candidate to:

- Have graduated from a degree in one of the following: 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.
- Attention to detail.
- Ability to work with a high level of confidentiality and sensitivity.

Contact Us

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