



Pacem

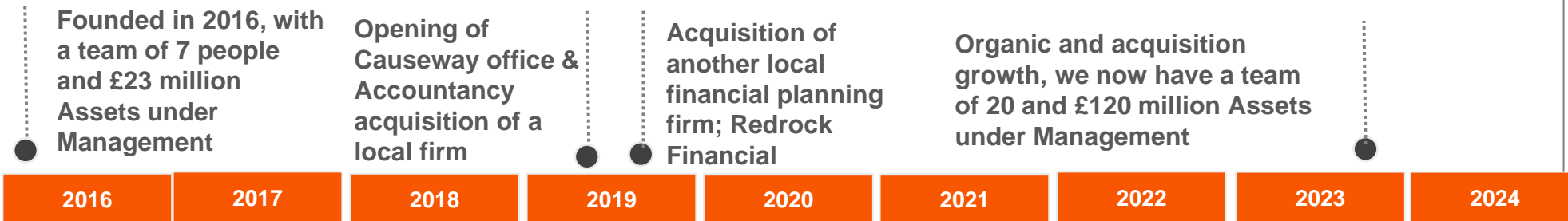
FINANCIAL ADVISORY

Financial Planning Analyst 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.



- Our team has grown from 7 people to 20 people.
- In our Financial Planning business our client Assets under Management have grown from £23 million in 2016, to £120 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.
- 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



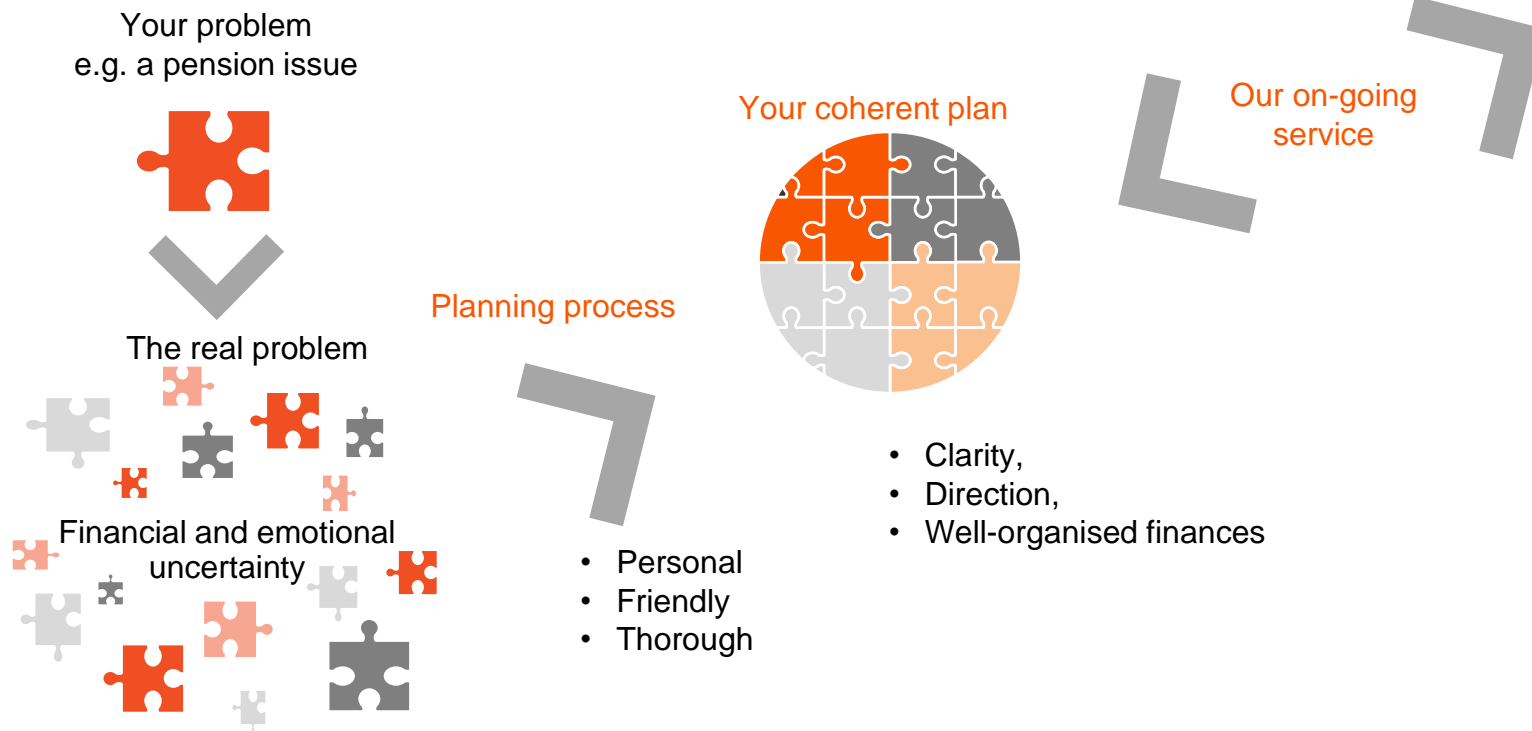
Pacem Financial Advisory

- 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



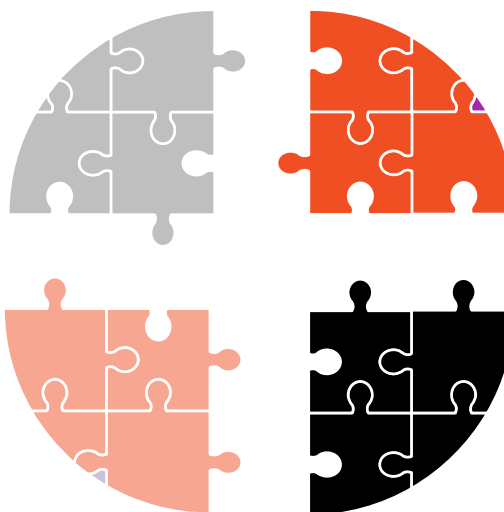
Pacem Financial Advisory

- 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

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

- ☒ Cloud Accounting Package
- ☒ Payroll
- ☒ Full book-keeping
- ☒ 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.**

- ☒ Cashflow Forecasting and Budgeting
- ☒ Risk Management
- ☒ 'What if' Scenario Planning
- ☒ Professional Tax Advice
- ☒ Industry Specific Expertise
- ☒ Succession Planning
- ☒ Business Valuation
- ☒ 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.



Business start

The Story Strategy Traction Lab

A Transformative One-day Workshop for Entrepreneurs and Wantrepreneurs

Would you benefit from a free one-day workshop in which you'll hone your business purpose, market focus, USP and story, whilst constructively appraising the marketing, goal-setting and prioritisation that will deliver your vision?

For more information, and to apply, visit www.podiem.com/SST
Deadline for applications: 12 noon, Monday 17 February 2020.

Supported by:

Belfast City Council

The Belfast Business Idea Award

Win £2,500 to give your business idea traction.

This competition is designed to unearth, recognise and help to fast track the best business ideas in Belfast. It is the strength of the idea that will be assessed rather than the achievements of the venture so far which means that those who have yet to set up a business have as much chance of winning as those who have already started trading.

For more information, and to enter, visit: www.belfastcity.gov.uk/ideaaward before 12 noon on Thursday 31 October.

All finalists will get to hear from entrepreneur, best-selling business author & international speaker, Lara Morgan.

Business support package
The winner and two runners-up will each receive a support package worth **over £3,000**

Supported by:

Belfast City Council

Fast Tracking 10 New Businesses

Expedite

Supported by:

East Belfast ENTERPRISE **Pacem ACCOUNTING & TAX ADVISORY** **The Foundry INSPIRE | START | GROW**

Pacem's Core Values

Core Values

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.



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 live 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.

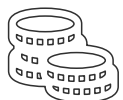
What's the real opportunity here?

-  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 Planning Analyst Role

- **Start Date:** November / December 2024
- **Location** - Based at Pacem Advisory Offices, Castlereagh Road, Belfast. Flexible working arrangements including working from home.
- **Salary** – Competitive salary
- **Hours** – 36.5 hours per week.
- **Reports to** – Operations Manager
- **Closing date for receipt of applications is Friday 15th November @12pm.**
- **CVs with a cover letter should be sent 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.

Career Path

- Below is an example of what a career path might look like for an Analyst, who has ambition to become a Financial Adviser.
- Often individual's may be suited to different Senior Roles within the business, including a Paraplanner role or other Operational areas.



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 a small 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 a professional service that provides clients with clarity, insight and peace of mind. This 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.

Detailed Duties

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

- Follow a strict compliant documented process on how the firm delivers financial planning advice to meet FCA regulations.
- Contact financial institutions and investment providers to assess new client's current holdings and portfolios.
- 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 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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