

JOB DESCRIPTION

Job Details	
Job Title	Corporate Financial Planner
Department	Corporate Team
Reporting Line	Financial Planning Manager
Direct Reports (If applicable)	
Location	Home Based but covering clients in the Greater London area

MKC Wealth is a boutique, independent wealth management firm with regional offices in London, Greater Manchester, Cheshire and West Yorkshire. We provide financial advice to private clients, their families, and corporate clients on inheritance tax, insurance, pensions, and investments. Our tailored approach focuses on understanding client goals and creating comprehensive financial plans to help achieve their objectives.

Job Purpose
<p>The Corporate Financial Planner focuses on workplace pensions and employee benefit packages for businesses, helping employers to meet regulatory requirements and to recruit and retain key staff. Alongside this, the role applies traditional financial planning principles in helping secure business continuity, business succession, profit extraction and exit planning.</p> <p>You will be required to provide corporate financial advice to clients and introducers and will maintain, develop and promote corporate business both internally and externally.</p>
Key Role Responsibilities
<ul style="list-style-type: none"> • Agree personal performance targets with the Financial Planning Manager and work proactively to achieve these objectives. • Provide a high-quality, compliant financial planning service to both new and existing corporate clients. • Promote the MKC Wealth brand as a leading provider of corporate financial planning solutions and work collaboratively with other departments to generate potential leads and opportunities. • Develop and maintain long-term financial planning relationships with corporate clients and key decision-makers. • Work closely with business owners and senior executives to understand their financial objectives, priorities, and constraints. • Prepare and deliver high-quality reports and recommendations in line with the firm's advice standards and implement agreed client solutions. • Ensure clients remain compliant with relevant statutory requirements while identifying areas where financial planning can support staff recruitment, retention, and overall employee value. • Maintain a strong understanding of employer statutory obligations and the tax and practical implications of group benefit arrangements.

- Present financial plans, recommendations, and projections clearly and effectively, ensuring clients understand the advice provided.
- Conduct regular reviews of corporate financial plans and group schemes, updating recommendations as business circumstances and objectives evolve.
- Maintain accurate and comprehensive client records in accordance with regulatory requirements and internal file quality standards.
- Collaborate with accountants, tax advisers, and other professional connections to support client outcomes and generate new corporate planning opportunities.
- Operate at all times within the regulatory framework set by the FCA and The Pensions Regulator.
- Maintain and develop professional competence by completing required training and ongoing professional development activities within agreed timeframes.
- Ensure group schemes are serviced efficiently and profitably by applying agreed servicing, advice, and remuneration models in line with Consumer Duty principles.
- Work collaboratively with colleagues across the corporate team to agree project responsibilities, timelines, and deliverables.

Person Specification

Qualifications

Essential:

- Fully qualified financial planner to Level 4.
- Demonstrable record and experience in an advisory role, including business or commercial clients.
- Strong understanding of financial planning principles.
- Ability to interpret business accounts for planning purposes.
- Experience preparing and presenting formal financial plans.
- Must hold full driving licence.

Skills & Competencies

- Client-focused.
- Strong relationship management and communication skills.
- Ability to translate financial concepts into practical planning advice.
- Strong attention to detail and documentation.
- A consultative approach to the employer's needs, focussing on regulatory duties and their employee benefits provision.
- Knowledge of investment planning within the corporate context, to include business succession, shareholder planning, business continuity, key person planning, profit extraction and business exit strategies.
- Confident in presenting to and meeting with groups or individual staff.

- Full understanding and experience of financial planning process, to develop opportunities for introductions to private client advisers.

Values & Behaviours

- Demonstrates integrity and professionalism.
- Treats colleagues and customers with respect.
- Promotes inclusion and equality.
- Maintains confidentiality.

Benefits

- 25 days holiday plus bank holidays, with the ability to purchase up to an additional 5 days per annum.
- Pension – 6% Employer contributions.
- Life cover – 4 x salary upon joining.
- Private medical Insurance with WPA. By invitation to join after successful completion of probationary period.
- Participation in the company EBT: At the ultimate discretion of the Board and successful completion of probationary period, be invited to participate in the Employee Benefit Trust (EBT). This will see you being allocated a % of the B-share pot.
- Discretionary bonus entitlement: Participation in the MKC discretionary bonus scheme, after successful completion of probation scheme.