

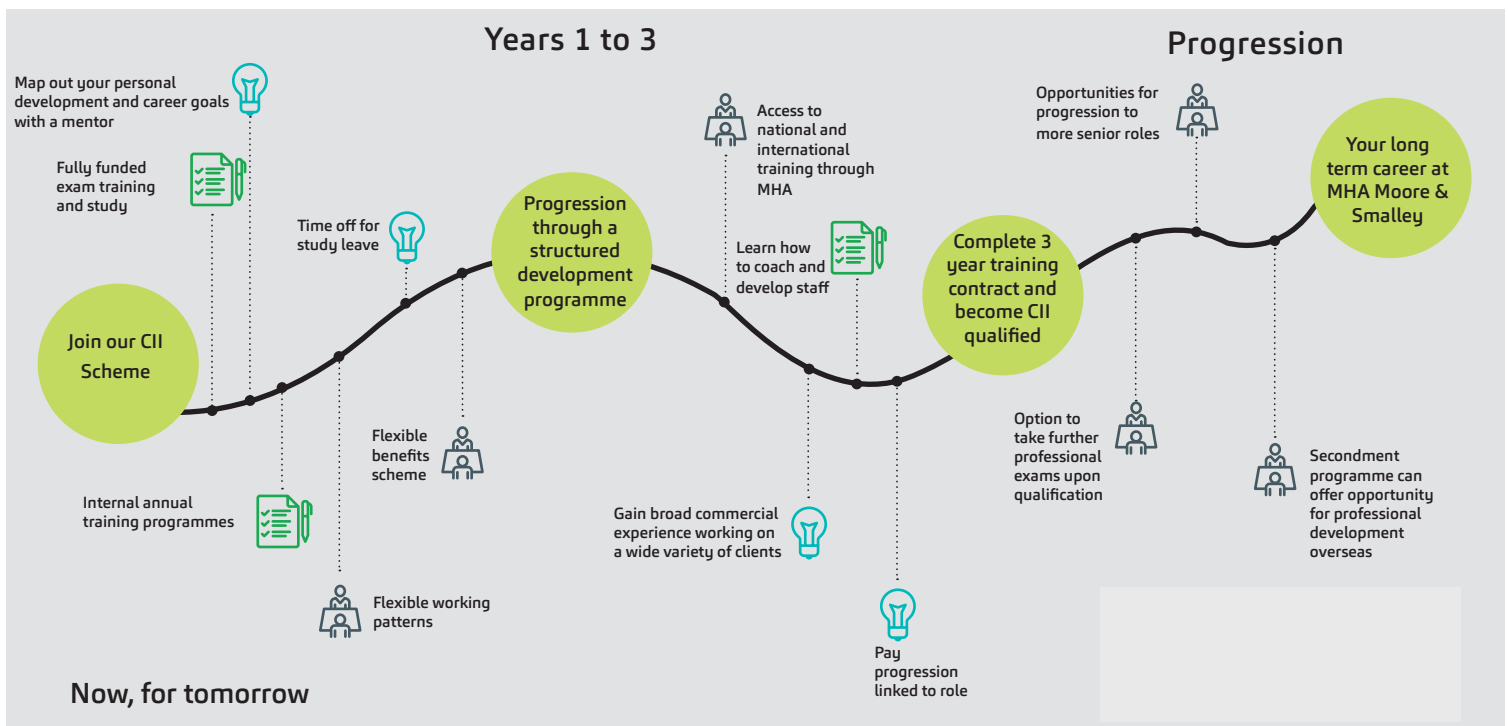
# Financial Planning / Wealth Management Graduate Trainee

## CII (Chartered Insurance Institute) Diploma / Diploma in Regulated Financial Planning

### About MHA Moore & Smalley

<p>Top 50 UK accountancy and business advisory firm</p>	<p>8 offices across Lancashire, Manchester, Merseyside Cumbria, and the East Midlands</p>	<p>Over 300 staff servicing over 5,500 corporate clients</p>	<p>Our services include audit and accounts, corporate finance, tax, payroll, financial planning and wealth management</p>	<p>We have national and international links through MHA and Baker Tilly International</p>
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### Your career with MHA Moore & Smalley



## The role

Our graduate training programme has an excellent reputation for providing a broad base of skills with real value in the commercial marketplace. Whilst the programme is stimulating and demanding, it is also designed to give you responsibility for your own career at an early stage.

## A week in the life of a graduate trainee

- 3 year training contract studying CII (Chartered Insurance Institute) Diploma / Diploma in Regulated Financial Planning
- Providing financial recommendations to clients, ranging from new cash accounts to pension transfers
- Updating client portfolios in line with their attitude to risk ahead of the investment review meeting with their adviser
- Liaising with clients to keep them up to date with the performance of their investments



## “What our current employees say



“Not only has MHA Moore and Smalley supported me in achieving a diploma in financial planning, but it has also helped to build my confidence as I have developed my role and increased my client contact. I have never felt out of my depth, particularly whilst studying for my diploma in financial planning and I have always been encouraged to progress and work just enough outside my comfort zone to allow me to grow and improve as an employee.”

Melissa Coppin - Private Client Manager (Financial Planning)