

The Equilibrium Programme

About Equilibrium

Equilibrium is the award winning Chartered wealth management company that offers a genuinely personalised financial planning and investment management service, giving clients confidence now and in the future.

Headquartered in Wilmslow, Cheshire, we oversee more than £484 million worth of assets for over 790 clients and the firm now has offices in Knutsford and Chester.

The Equilibrium Programme

In order to ensure that the financial services sector and in particular wealth management has the very best talent, Equilibrium Asset Management LLP have created a 2 year training programme that will see candidates become Diploma qualified client managers at the end of their tenure.

We are looking to recruit only the highest calibre of candidates to become part of our rapidly expanding team of professionals.

Whether you come from an academic background or you have worked in an office environment, this programme will provide the right individuals with the chance to develop within a company and on a career path that can offer many great rewards.

What you get in return

Not only do you get the experience of working with an award winning Chartered wealth management company you also get the opportunity to become Diploma qualified.

You will be rewarded financially with a fantastic salary as well as some amazing benefits including;

- 33 days holiday plus bank holidays
- Paid study leave
- Complimentary breakfast each working day

Starting salary £19,000

Salary after successful completion of year one £21,000

Salary after successful completion of year two £25,000

Equilibrium Asset Management LLP

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The Equilibrium Programme

What it includes

The Programme will comprise of the following elements.

Initially you will work across the company in a more general capacity, in order to truly understand how the business works.

- Attending 4 marketing meetings
- Attending seminars
- Sitting with the marketing team
- Working on reception
- Sitting in with the investment team and attending an investment meeting
- Sitting with the Compliance team for 1 day
- Meet with senior partners

After month one you will then move to the Client Manager side of the business;

You will move throughout the 3 teams

- Implementation Team for 6 months
- Wealth Team for 6 months
- Discretionary Team for 6 months

Although the clients that you work with may change and with that the challenges and complexities of the role, the client manager does similar work within each of the three teams. Experience here will include;

- Learning our systems and processes
- Sitting in on client meetings
- Learning how to take meeting minutes
- Learning how to carry out product reviews
- Administration tasks
- Letters of Authority
- Understanding how and why we do things at Equilibrium
- A complete understanding of the client proposition

Study

We expect you to be studying for and sitting your Diploma exams. There are different exams depending on your areas of interest however exams typically taken include;

- R01 Financial services, regulation & ethics
- R02 Investment principles and risk
- R03 Personal taxation
- R04 Pensions and retirement planning
- R06 Financial planning practice

We will provide you with all the relevant tools and materials in order to complete the exams but

ultimately the exams you sit and the timelines you sit them in will be up to you. However you need to be half way to Diploma qualified by the end of year one and completed by the end of year two.

Alongside the professional qualifications Equilibrium will carry out quarterly assessments to establish what you are learning about us as a business, the way we work, our ethos, the fee's we charge etc. Each quarter becoming increasingly more detailed.

After the completion of the first year you can expect a formal review and one again at the end of your second year.

To apply for this fantastic programme or to find out more please contact sarah@eqllp.co.uk

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