



**wr ethical.**

## Self-employed Protection Advisor

### About the company

We have a simple aim – to help people buy a home they love in the most ethical way possible. Our business is advising on mortgages and protection in England and Wales. We try to act in a way that:

- Saves people money & helps them make great financial decisions
- Lets everyone know that they are cared for
- Enables people to make ethical choices with their biggest purchases
- Inspires others in our industry
- Enables charities to receive more income

We are a small, friendly team, who understand we each have different priorities, abilities and demands on our time. You will find us inclusive, flexible and trusting.

We are an Authorised Representative of Rosemount Financial Solutions (IFA) Ltd.

### About the job

We are looking for our first protection adviser to work with us, on a self-employed basis. You will be supporting a growing team (currently 4) mortgage advisers and would be the single point of referral for protection and insurance. It is important you are:

- Fully qualified, experienced, and able to keep yourself up to date with industry knowledge.
- Independent and motivated.
- A willingness to fit in with the way we work, and protect & promote our brand
- A Caring and hard-working attitude

As a self-employed protection advisor, you will work with our other advisors and admin, compliance & marketing teams. You will:

- Work on all leads passed to you by our team (plus any you generate yourself)
- Support customers through from initial conversation through to application and beyond
- Work openly and in a spirit of trust with others in the team
- Keep accurate records and work with our systems & processes
- Manage your own workload
- We would expect you to join us in the office in central Bristol most Mondays & Tuesdays.

### About you

This is a guide, not a tick-box, so if you think you are right for us, but don't quite have all of these skills yet, please still apply.

- Suitable professional qualifications for the role
- Able to demonstrate a track record of happy customers
- Willing to regularly feed back to and work with management & compliance teams at WR Ethical and our Network.
- Motivation beyond the money – care for people, planet & healthy processes.

### What we offer

We think that our culture and approach are our key strengths. We understand the complexities of life, are open to new ideas, and are passionate about making a difference.

- Flexible working – as a self-employed role, you set your own working schedule
- A company with a strong and trusted brand and competitive fees – meaning very high conversion rates.

- A savvy and effective admin team to support from when applications are submitted.
- Ethos of process improvement designed to maximise your efficiency.
- Responsive, pro-active Marketing support (both on creative and compliance side)
- Competitive commission splits (50% on referral, 80% on self-generated) on commission received by WR Ethical.
- In-house referrals with competitive commission splits to financial planning and others.
- Panel includes Aviva, The Exeter, Guardian, HSBC, L&G, LV, Royal London, Scottish Widows, Vitality, Zurich.