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Julie Wild of Carbon Financial Partners

Type of paraplanner:

Full-time paraplanner and business co-ordinator in a team of five paraplanners, supporting nine advisers.

Qualifications:

Financial planning certificate and currently studying for the final exam to gain my diploma.

Paraplanning since:

Full-time paraplanner for three years.

Why paraplanning?

I enjoy being involved in a large part of the service we provide to clients, from analysing their current situation to formulating a suitable plan and compiling the report that is used to present the solution to the client. Paraplanning requires a combination of in-depth technical knowledge and the ability to create written reports, which makes the work varied and challenging.

Most challenging aspect of paraplanning:

The fact that the industry and legislation are continually changing means there is always more to learn and ongoing **training and study is essential.**