

DEVELOPMENT ROADMAP

Year 1	Year 2	Year 3
Trainee Client Services Administrator	Client Services Administrator	Trainee Paraplanner
Working towards: <ul style="list-style-type: none"> RO1 RO5 	Working towards: <ul style="list-style-type: none"> RO2 RO3 	Working towards: <ul style="list-style-type: none"> J09 RO4 RO6
<p>Client service</p> <p>Understanding Administration Process</p> <p>Preparing for client reviews</p> <p>Learning about the profession, providers and products</p> <p>Observe client meetings</p>	<p>Research analysis and simple paraplanning</p> <p>Observe more complex client meetings</p> <p>Support the paraplanners in creation of financial plans</p> <p>Responsibility for actions after client meetings</p>	<p>Creation of financial plans and scenarios</p> <p>Support with more complex paraplanning</p>



Then choose your specialism if you wish to continue your studies into years 4, 5 and beyond	
Senior Paraplanner / Financial Planning Analyst	Financial Planner
Working towards: <ul style="list-style-type: none"> 4 x AF Papers 	Working towards: <ul style="list-style-type: none"> Assessments for Certified Financial Planner to reach 290 required credits Becoming a Chartered Financial Planner
<p>Moving into and developing your specialised area</p> <p>Complex Paraplanning and financial plans with support from the Financial Adviser</p> <p>Lead Paraplanning on complex cases and provide technical support to others</p>	<p>Moving into and developing your specialist area</p> <p>Gain competent adviser status</p> <p>Start to lead client meetings and build your own client bank</p> <p>Take on more substantial clients</p>

YOUR FUTURE IN FOCUS