

TYPICAL EARNINGS

YEAR 1	YEAR 2	YEAR 3
£40,000	£75,000	£75,000+

ABOUT

Whether you are new to financial services or already have experience, SJP Academy programme will help you gain the right qualifications and skills. With over 30 years of experience in supporting their Partnership to thrive, the Academy was first launched in 2012 to train new advisers. It is now the leading training programme to develop the qualifications, knowledge, and practical skills required to deliver high-quality advice to clients.

THE QUALIFICATION

To give financial advice in the UK, you need to hold a Level 4 Diploma in Regulated Financial Planning. They have partnered with the Chartered Insurance Institute examination body. Their industry-recognised qualification is made up of six exams: R01 to R06. You will be required to pass R01 and R05 before you start the programme - with support from their online study portal.

TERMS

Term 1 - For those not already qualified, your journey starts here.

Gain professional qualifications

Secure the core technical knowledge needed to become a financial adviser. A 3-month term with on-demand learning as well as face-to-face support designed to help you complete your Level 4 Diploma in Regulated Financial Planning

- Engaging, accessible, accredited learning content.
- Online modules, virtual classrooms and live drop-in surgeries.
- Support from industry-leading experts and mentors.
- Bespoke study journey and support for learning differences.
- Access to the Academy's online study portal, packed with learning tools.

At the end of term 1, you'll spend two weeks with your Academy Development Manager to review and reflect on your learning so far.

Term 2 - For those already qualified, your journey starts here.

Train to advise clients

Build on your technical knowledge and further develop your skills for working with clients

A 3 month term that provides you with the confidence and knowledge needed to deliver goal-based financial planning to clients.

- World-leading learning technology with virtual reality headsets for a truly immersive training experience.
- Inclusive, flexible digital learning - including box sets and podcasts delivered by industry experts.
- Live virtual training sessions delivered by experts.
- One day each week in a successful financial advice business, enabling you to turn theoretical knowledge into practical application.

Term 3 - Achieve Competent Adviser Status

Start seeing clients and demonstrate your ability to provide advice.

A 3 to 6 month term with workplace learning, delivered via structured development, observations and shadowing as you meet clients for the first time.

- Meet clients and further your skills under supervision until you reach Competent Adviser Status and receive a Statement of Professional Standing.
- Receive training in advisory and client acquisition skills.
- Learn commercial skills and how to grow a business or develop your own client relationship within one of our existing businesses.

Term 4 - Grow a sustainable business

Establish a sustainable business and graduate from the Academy

A 4 to 6 month term that offers you practical, hands-on learning alongside tailored classes to support your continued development.

- Continued support via your Academy Development Manager and a St. James's Place mentor who is an existing Adviser within our partnership.
- Focus on the right learning at the right time for you.
- A series of core and elective modules.

BENEFITS

Meritocracy

Efforts are reflected in your rewards

Opportunity

50,000 advisers needed to fill the 'advice gap'

Autonomy

Grow the career or business that suits you.

Connections

A meaningful career helping others by supporting clients.

JOB TYPE

The St. James's Place Academy is full time.

You will be given a timetable and all the learning tools, including online workbooks, virtual reality practise sessions, online quiz's/ videos etc.

If you're setting up your own partner practice, you will be given £1000 per month for the first 3 months for financial support when passing your exams.

In term 2, you then go up to £2000 per month.

If you're looking to join an existing practice, you will have an initial meeting with that firm to arrange financial support, possibly a salary if you're employed.

They will take time to understand your position and find the right practise which suits you, to the level that you need.

ACADEMY REQUIREMENTS

10
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Although it was difficult, there wasn't any point that I regretted it. I knew that the business would come if I worked hard enough, and I knew that I didn't want to get back to production or to work for anybody else.

Emily Man

Film Director to Financial Adviser



P PERSONAL IMPACT

R RESILIENCE

I INTEGRITY

D DRIVE

E EMPATHY

This is SJP's chance to work together to determine the right goals for you, whether that's aiming to start a business or to join an existing one.

SJP take the time to listen and consider your background and ambitions, helping you to discover the right path, and providing you with resources and guidance to support your application.

They are looking for candidates with the right attributes to help clients and to meet their needs. based on their 10 years' experience of delivering first class client outcomes, the application process is designed to attract the candidates they're looking for. It helps them make the most informed decision, while preparing you for the commitment you will be making to yourself and your training.



**FINANCIAL
PLANNER
LIFE
ACADEMIES**