

Chase de Vere

Your *future* starts here

Our Financial Adviser Graduate Programme



“Being a Financial Adviser at Chase de Vere is a challenging, yet incredibly satisfying role. The company fosters a kind, compassionate and supportive environment which has enabled me to build a successful career, alongside having a family.”

Anna Owen – Financial Adviser



About us

At Chase de Vere, we have over 55 years of experience in helping people achieve financial security and confidence. As one of the UK's leading independent financial advice firms, we pride ourselves on providing impartial, client-focused advice.

Chase de Vere joined the Swiss Life Group in 2012. This invaluable backing empowers us to confidently pursue our ambitious growth objectives and fulfill our mission of becoming the preferred national independent financial advisory firm for both clients and employees.

Our independence gives us the freedom to find the best solutions for our clients. We are more than just a financial advice firm - we're a team of passionate professionals dedicated to helping clients and colleagues alike to **Be future confident**. Now, we're inviting you to join us.

Our graduate programme offers a clear pathway to becoming a Financial Adviser, empowering you to build a rewarding career while making a real difference in people's lives. With over 650 employees, including more than 240 Independent Financial Advisers, you'll be part of a team that values excellence, integrity, and your professional growth.

We believe in fostering a workplace culture that values:



Collaboration – working together to shape the future of independent financial advice.



Innovation – we are committed to supporting you achieve your career goals and aspirations.



Development – encouraging new and innovative ideas that contribute to our success.



*“At Chase de Vere, we enable our clients and their families to feel confident about their financial future, now and in the years to come, no matter what life throws at them. Underpinning this statement is our company purpose, **Be Future Confident**.”*

Our purpose applies equally to our colleagues. We want our colleagues to feel their work has a valuable purpose in the positive difference we can all make to our clients' lives. We want to ensure that our colleagues feel confident in their own futures, that they can build their careers at Chase de Vere and have peace of mind for themselves and their families.”

Kathleen Gallagher, Chief Executive Officer

Why join us?

At Chase de Vere, our people are what makes us a fantastic place to work. When you join us, you can look forward to an exciting and rewarding experience:

A purpose-driven culture

Be part of a team united by our mission to help clients and colleagues to 'Be Future Confident'

Opportunities for growth

We are invested in your personal and professional development and will provide fully funded exam support, helping you to achieve your Level 4 Diploma in Regulated Financial Planning.

Hybrid working

Our hybrid working model offers the flexibility our colleagues desire while preserving our strong, people-focused culture.

Meaningful impact

Make a meaningful impact by helping people achieve their financial goals and dreams.

Outside of work

A highlight of our calendar is the annual conference at the Kimpton Clock Tower hotel in Manchester. This allows us to review our performance over the previous year and also learn more about our future plans and upcoming projects. The conference is followed by a gala dinner that provides the perfect opportunity to unwind with colleagues and celebrate.

We also proudly support two charities close to our hearts, MND Association and Cancer Research UK. Throughout the year, we organise various fundraising events, from our annual charity walk to bake sales and raffles. We also encourage our colleagues to engage with their local communities by utilising our paid volunteering days each year to support a charity of their choice.

Our benefits

In addition to a competitive salary, we provide a comprehensive benefits package, including:

- ✓ Fully funded exams and paid study leave
- ✓ 25 days holiday plus bank holidays (with a holiday purchase scheme) plus an extra day off for your birthday
- ✓ Annual bonus
- ✓ Contributory pension scheme
- ✓ Life Assurance
- ✓ Paid volunteering days and annual company-wide events
- ✓ Access to a wide range of flexible benefits, including Gym membership discounts and a cycle to work scheme

“I enjoy working at Chase de Vere because of the One Team mentality, which means that everyone across the business is striving to achieve the best possible outcome for clients.”

Matthew Knapp – Financial Adviser



Our graduate programme



Gain a thorough understanding of the Operations, Paraplanning and Advice processes.



Fully funded exams - Complete Level 4 Diploma in Regulated Financial Planning.



Based in our Bath office, with travel to other locations throughout the programme.



From Graduate to Financial Adviser

From day one, you'll receive extensive support. Our comprehensive induction program, continuous on-the-job training, and regular guidance from your 'Graduate Mentor' will ensure that we are with you every step of the way. You'll gain valuable insights and experience with our operations and paraplanning teams. Over the course of 18 months, you'll also complete your Level 4 Diploma in Regulated Financial Planning, preparing you for a seamless transition into a Financial Adviser role.

Exposure to operations:

Gain hands-on experience with our teams dedicated to providing administrative support and exceptional client service.

Paraplanner training:

Participate in tailored sessions with our Paraplanner Development Manager to acquire the essential skills and knowledge for the role. This includes researching investment products, analysing and compiling financial reports based on individual client circumstances, ensuring advisers can provide the best recommendations for their clients.

Financial adviser training:

Work closely with our Competence and Development Managers, who will provide continuous support and guidance to ensure a smooth transition into the Financial Adviser role at the end of your training.

Client meeting opportunities:

Enhance your skills by attending client meetings with experienced advisers.

Department rotations:

Gain a comprehensive understanding of our business by spending time with different departments and learning how each function operates.

Learning and development:

Regularly enhance your soft skills through engaging sessions with our L&D team.

Graduate mentor meetings:

Regularly connect with your 'Graduate Mentor' to review your progress and receive valuable feedback.

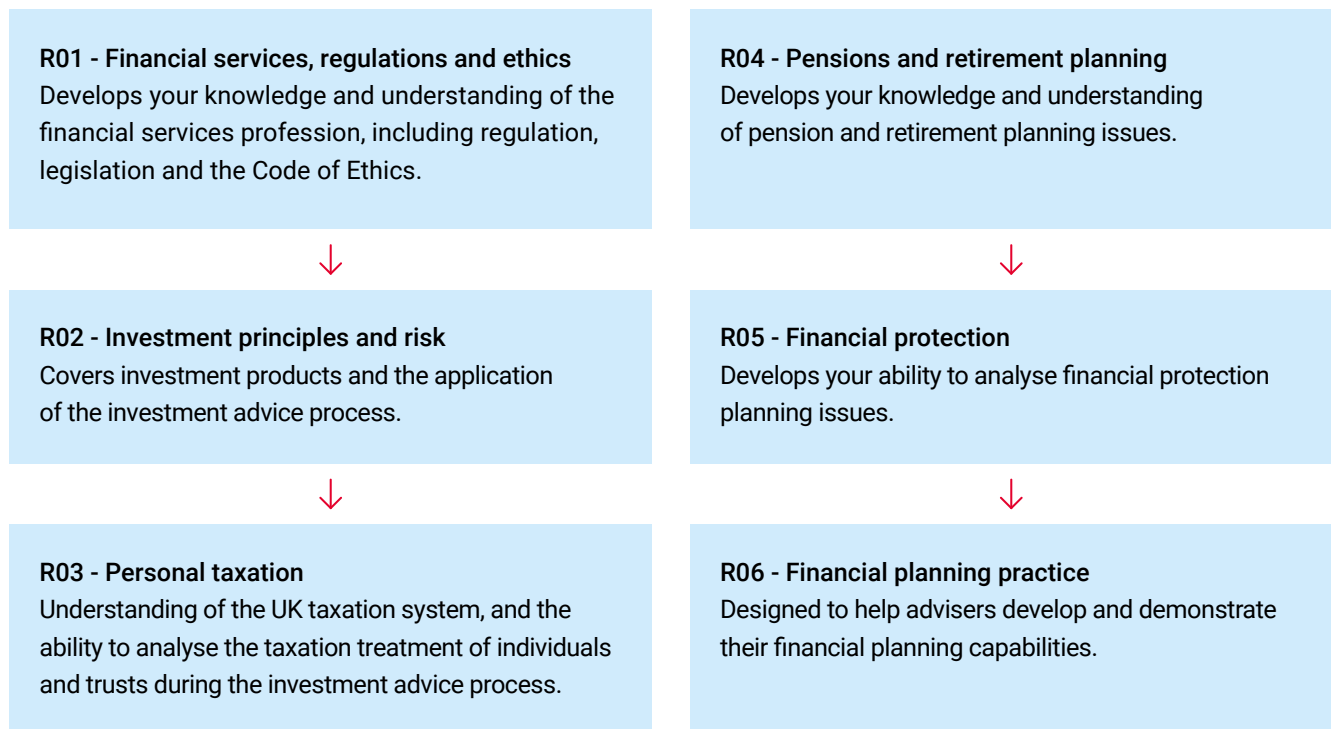
Level 4 Diploma in Regulated Financial Planning:

Obtain your diploma with full support and structured study sessions throughout the scheme.

Your exam pathway

Exam pathway

Throughout the 18-month program, you'll complete the six core units of the Level 4 Diploma in Regulated Financial Planning, designed to enhance your technical knowledge and financial planning skills. In addition to independent self-study, we offer focused revision sessions, training materials, and mentor support. We also fully fund the diploma and exam materials, ensuring you have everything you need to succeed.



What you need to know

What we are looking for...

As a Financial Adviser at Chase de Vere, you will be a knowledgeable and trustworthy professional who helps their clients to achieve financial security and confidence.

You will possess strong analytical skills to assess financial data and market trends, and excellent communication skills to explain complex financial concepts clearly.

You will be detail-oriented, and adept at problem-solving to develop strategies that meet clients' financial needs and goals.

Your career should empower you to dream big and achieve more. At Chase de Vere, we provide the opportunities to help you succeed, while making a meaningful impact in the lives of our clients.

Our entry requirements

Successful candidates will need a minimum 2.1 honours degree. We welcome graduates from all academic backgrounds; however, candidates must demonstrate strong literacy, numeracy, and communication skills.

Stage 1 – March 2025 – Applications Open

To apply, please submit a CV and cover letter introducing yourself and explaining why you want to become a Financial Adviser with Chase de Vere. Candidates also have the option to submit a short 1-minute video if they wish.



Stage 2 – March/April 2025 – Shortlisting Begins

We will arrange a short call with all successful applicants. This informal conversation is an opportunity for us to get to know you better and for you to learn more about our programme and ask any questions you may have.



Stage 3 – April 2025 – Assessment Centre

Successful applicants from shortlisting will be invited to our Bath office for an assessment centre. This will include a mix of individual and group activities, allowing us to better understand your key skills and attributes.



Stage 4 – Outcome

All successful candidates will be contacted shortly after the assessment centre. For those who were not successful, we will provide constructive feedback.



Stage 5 – September 2025

The programme begins in our Bath office. It's time for you to unlock your potential with Chase de Vere!

“I started with Chase de Vere at 16 during my work experience, later completing a year-long internship with Swiss Life whilst at university. I’ve stayed with Chase de Vere because of the great people and the opportunities I have had to develop and progress. I honestly couldn’t imagine working anywhere else.”

Lewis McPhail – Financial Adviser

Meet our people



Chelsea Knowles – Financial Adviser, London

“I have been with Chase de Vere for 7 years now. I have grown up with this company and love everything about working here. I have progressed from the Client Support Team into financial advice and have received an abundance of support along the way. Most importantly, everything we do is centred around providing positive outcomes for our wonderful clients.”

Oliver Hyatt – Financial Adviser, Manchester

“I joined Chase de Vere in 2022 from a completely different industry, hoping to become an Independent financial adviser. Working initially as an administrator, I spent a lot of my time outside of work studying for the Level 4 Diploma. Chase de Vere is a company that values hard work and dedication and actively promotes from within. There are a range of roles and pathways depending on where you want to go in your career.”



Maia Jones – Financial Adviser, London

“I joined Chase de Vere straight out of university because it offered a clear career path into financial advice. Since starting in 2018, Chase de Vere has been incredibly supportive, helping me progress from administrator to Financial Adviser, with valuable experience in paraplanning along the way. Working with various advisers and clients has allowed me to learn different advice styles and understand the evolving needs of clients.”



James Fitzgerald - Financial Adviser, Bath

"I came to Chase de Vere after completing my apprenticeship as I wanted to work for an independent financial advice firm. Chase de Vere have supported me through my Chartered exams and onwards to Fellowship of the PFS. I applied this knowledge in my role as a paraplanner, working closely with a senior adviser in the Bath office which gave me the confidence to take the step into becoming a Financial Adviser."

Jay Dhaliwal – Financial Adviser, Birmingham

"Working for Chase de Vere has genuinely changed my life! From joining as a Trainee Adviser in 2019, to achieving Chartered status in 2022, Chase de Vere have supported my professional development every step of the way. The company culture, technical training, client exposure, and opportunities to get involved in presentations and events to generate new leads has helped build my confidence to do the job successfully. If you're ambitious, eager to develop, and passionate about helping clients to achieve their financial goals, I highly recommend starting your journey here."



Matt Beck – Financial Adviser, Bath

"I joined Chase de Vere in 2017 as an administrator in the Bath office, while continuing my Level 4 Diploma exams. This role gave me valuable insight into the advice process and industry. In 2018, I progressed to paraplanner, sharpening my technical knowledge and working closely with a senior adviser. Since 2019, I have been an Independent Financial Adviser, initially with senior support. My role is diverse, balancing office work, client meetings, and remote work. We advise clients on all aspects of finance, from investments and pensions to life insurance and estate planning – no two days are the same."

What are you waiting for...

Apply now

To apply, simply scan or click the QR code below



For any questions please contact:
recruitment@chasedevere.co.uk

For further information visit our website: chasedevere.co.uk/careers

Our awards



'GLASSDOOR' 4.2 ★★★★★



Chase de Vere

Chase de Vere Independent Financial Advisers Limited (registered in England Number 2090838)
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