



Advisory Stockbroker

Location: Guernsey

The Role

As a member of the Advisory Stockbroking team, you will support our team of advisers while developing the knowledge, experience and professional qualifications needed for a career in investment advice. You will gain exposure to the full investment process, including client service, portfolio management, investment research, trading and the wider advisory stockbroking service. This role would suit someone who has a genuine interest in financial markets, is comfortable working with detailed information in a fast-paced environment and motivated to build both their technical investment skills and client-facing capabilities.

Key Responsibilities

- Support Titan Wealth's qualified advisers in delivering suitable investment advice across the firm's advisory services, ensuring clients' risk appetite, investment objectives and portfolio requirements are fully understood.
- Assist with the ongoing monitoring of client portfolios, including reviewing holdings, recommendations, potential actions, review points and follow-up tasks.
- Prepare investment proposals, portfolio reviews, client meeting packs and supporting documentation to a high standard and within agreed timeframes.
- Review market updates, financial reports, company announcements and stock-specific events, highlighting relevant day-to-day insights to the advisory team.
- Support advisers in communicating with clients regarding portfolio matters, investment opportunities and potential trades, under appropriate supervision.
- Prepare and input trades accurately, following up with client confirmations, ensuring client confirmations are obtained and internal dealing procedures are followed.
- Attend investment calls, internal meetings, company presentations and client events to develop market knowledge and maintain awareness of industry developments.
- Maintain accurate client records, file notes and documentation in line with internal standards and regulatory expectations.
- Adhere to company policies, dealing procedures and regulatory requirements, including conflicts of interest and market abuse rules.
- Contribute to team efficiency, service standards and the overall client experience while maintaining the highest standards of professionalism and acting in the clients' best interests at all times.

Key Skills & Experience

- Genuine interest in investments, financial markets and building a long-term career in stockbroking.
- Strong numerical, analytical and IT skills, with the ability to interpret information accurately and work confidently with data.
- Commitment to professional development, with completion of, or active progression towards, the CISI Investment Advice Diploma (required as a minimum to provide investment advice). Support will be provided for further professional qualifications, including CISI PCIAM and Chartered Wealth Manager status.



- Clear, professional communication skills and the ability to build effective working relationships with clients, colleagues and external contacts.
- Well organised, proactive and able to manage competing priorities within agreed guidelines and deadlines.
- Professional presentation and conduct at all times.

Why Join Us?

At Titan Wealth, we believe in empowering our people to make a difference. You'll be part of a close-knit, high-performing team that values integrity, collaboration and strategic thinking. We offer:

- International exposure across key financial jurisdictions.
- Opportunities for career progression and professional development.
- A culture of openness, challenge and continuous improvement.