



July 2025

# Job Description

**Title: Talent & Development Specialist**

**Company: Wren Sterling Financial Planning Limited**

**Reports To: Director of HR**

## Company Overview

Wren Sterling is a UK-wide independent financial advice business working with over 16,000 clients. In complex markets that change frequently, we help our Workplace and Private clients make the right financial choices to make them feel confident and in control of their finances.

In the Private Client market, we specialise in all aspects of pensions, investments, retirement planning, estate planning and tax planning. For our Workplace clients we are experts in workplace pensions, employee benefits, and workplace wellbeing strategies, helping organisations and their employees take the biggest financial decisions.

We're a fast-growing business that is committed to giving our employees a fulfilling experience where everyone can grow professionally in a supportive environment. Our values guide everything we do, from how we support our colleagues to how we serve our clients. Discover more about our four values on our website:

- Wren Sterling Knows
- Wren Sterling Cares
- Wren Sterling Acts
- Wren Sterling Delivers

## Role Outline

The Talent & Development Specialist is responsible for supporting the design and delivery of training solutions in support of all aspects of development that fall outside of FCA regulated T&C requirements, to respond to training needs analysis for the various career paths throughout the business. Training will be delivered directly via remote learning (using video and MS Teams) and face to face interventions and through the engagement with external training providers.

This role will also maintain and enhance all administration associated with delivering training at Wren Sterling, focussing on the continuing evolution of the Induction Programme to effectively onboard both new starters and the integration of colleagues transferring from acquisitions.

## Qualifications

### Essential:

- 5 GCSE's or equivalent (including Maths and English)
- CIPD Level 3 Training Certificate (or equivalent)

### Desirable:

- Associate Diploma in Organisational Learning and Development
- Attainment of or studying towards Level 4 Diploma in Regulated Financial Planning 'or' qualifications equivalent

## Role Competencies

	Influencer	Achiever	Developer
Business Ethics			X
Communication		X	
Organisation		X	
Customer Service		X	
Leadership			X
Teamwork		X	
Technology		X	
Expertise		X	

## Principle Objectives & Responsibilities

Principle Objectives and Responsibilities include the following, (other objectives may be assigned):

- Working with the Director of HR, define the WS annual L&D programme for existing employees following organization wide Training Needs Analysis process.
- Deliver the Wren Sterling New Starter Induction Programme, ensuring new starters get a great onboarding experience across the business.
- Working closely with Managers at all levels, develop and deliver L&D interventions across all formats to support training needs for knowledge, skills and soft skills training.
- Manage Financial Services provider training to meet technical training needs.
- Working with Subject matter Experts, design, manage and distribute all online training content on SharePoint to support our business strategy and mandatory training requirements for working within a FCA regulated environment.
- Working with the Integration Team, support all acquisitions by providing face to face and remote training of WS processes & policies to support the integration of transferring employees.
- Support the Wren Sterling annual training budget, including the booking of training requests for training and professional qualifications, ensuring that requests are reviewed and approved by the Director of HR (as required).
- Develop content for the L&D Hub and provide consultancy support for all areas of the business on the development and delivery of training materials.



- Maintain accurate learning and talent data within HR systems and produce regular reports and dashboards for senior stakeholders.
- Promote professional behaviour by demonstrating courtesy and respect to all colleagues and following the Company's equality and diversity policy at all times.
- Ensuring health and safety policies are observed.
- Completion of other reasonable duties, as defined by the Senior Management Team.

## Knowledge Required

- Minimum 3 years' experience in a similar Learning & Development role.
- Understanding of Apprenticeship and the RQF framework is desirable but not essential.

## Skills Required

### Essential skills:

- IT literate, including all Microsoft Packages.
- Coaching & facilitation.
- Attention to detail.
- Excellent presentation skills.
- Training & development of colleagues.
- Excellent written and verbal communication skills.
- Self-motivated.
- Customer focused.
- Analytical skills.
- Problem solving.
- Ability to efficiently manage priorities and workloads.
- Ability to meet strict deadlines.

### Desirable Skills:

- Financial Planning skills
- Basic understanding of Power BI Reporting Package

## Key performance Indicators

The performance of the staff member assigned to this job role function shall be measured by:

- Successful Delivery of agreed training Interventions.
- Individual meets specific agreed KPIs and SLAs.
- Internal and external customer satisfaction measures.
- Adherence to all company policies and procedures.
- Adherence to compliance and other legal regulatory processes.

The above statements are intended to describe the general nature and level of work being performed by the person taking the role of this job. They are not intended to be an exhaustive list of all responsibilities and activities required of the position.

