



## **ASSET CONSULTANT**

### **KEY PERFORMANCE AREAS**

#### **Responsibilities will include the following:**

- Handling of new sales and assisting with retention for direct unit trust business.
- Provide clients with fund specific information, including specific investment details and legalese with regards to all funds.
- Possess a thorough working knowledge of all of investment products, past and present.
- Develop a sound knowledge of investments, markets and remain informed on current affairs.
- Provide marketing literature and any other information on funds to clients.
- Deal with service telephone calls (balance enquiries, statement requests, repurchases and general queries).
- Ensure that all documentation requirements are met for all client transactions.
- Deal with queries and the correct channelling thereof.
- Be fully competent on all administrative and reporting procedures and processes relating to funds, as well as the correct procedures for following up on queries and solving problems.
- Be prepared to take full ownership of tasks delegated as well as identifying and rectifying administrative problems.
- Be passionate about service and absolutely meticulous in executing tasks.
- Take responsibility for maintaining strong, effective working relationships with the administrative team.
- The ability to fulfil a pro-active marketing role.

### **SPECIFIC REQUIREMENTS**

- Previous exposure to sales environment
- Solid background in client liaison
- Ability to work flexible hours
- Previous Unit Trust experience preferable
- Ability to communicate in both English and Afrikaans

### **QUALIFICATIONS AND EXPERIENCE**

- Relevant tertiary qualifications/ B degree or the commitment to study towards one
- Unit Trust industry experience
- AUT/ACI Level 1 and 2 (or similar)
- CFP will be to your advantage

### **COMPETENCE REQUIRED**

- The position requires both technical skills and knowledge of financial markets.

- Requires good interpersonal skills.

#### **KNOWLEDGE**

- PC Literate (working knowledge of MS Office Suite, such as Excel and Word)
- Basic Investment Principles and practices/ UT Knowledge.

#### **SKILLS**

- Excellent Communication and Interpersonal skills
- Results/ target driven
- Ability to work in a fast paced environment
- Analytical and technical skills
- Patience and compassion with clients
- Actively and consistently demonstrates integrity in service to clients
- Advanced telephone skills
- Assertiveness
- Efficiency
- Able to work under pressure
- Attention to detail
- Organisational skills
- Teamwork

#### **ATTITUDES AND VALUES**

- Highly responsible and committed
- Sincere and trustworthy
- Willing to learn
- Client service excellence
- High level of ethical conduct
- Punctuality
- High energy levels