



**Title:** Financial Planning Coach  
**Reports to:** Head Financial planning coach  
**Based at:** Johannesburg

**Job purpose:**

Provide financial planners with the training, development, systems and implementation platforms to empower them to give best of breed independent financial advice.

**Specialist skills:**

1. The candidate will be required to have specialist skills in legal/technical financial planning questions. Ideally, experience as a financial planner and (as a minimum) experience as a legal consultant (preferably in the agency/broker environment) would be ideal.
2. A very sound understanding of financial planning, specifically estate planning.
3. The successful candidate will be responsible for being the lead coach for:
  - Legal/technical queries from financial planners, identifying areas for education, developing and coordinating material so that financial planners may be up to date about relevant developments in the financial planning arena; and
  - Liaising with the legal team to ensure that developments and questions are addressed and positioned accordingly.

**Common skills:**

1. Education on the fundamentals of investments;
2. A sound grasp of behavioural finance and client interaction;
3. Financial modelling for clients;
4. Seeing clients with financial planners for the purposes of education and development;
5. Slotting into media exposure framework (articles for newspapers and magazines, radio interviews and TV appearances). The candidate will as such need to be articulate and comfortable with writing and presenting.
6. Presenting at forums and workshops to multiple financial planners or external audiences.

**Qualifications:**

1. Minimum of an LL.B. qualification (or equivalent tertiary qualification)
2. CFP certification and registered with FPI.
3. Advanced diplomas in financial planning are advantageous.

**Remuneration**

1. The successful candidate will receive training on those of the above common technical aspects that they are not proficient at. It is thus more important that the candidate has an aptitude, rather than an existing skills base, with these (although the latter would be ideal).
2. Basic salary with benefits with a cost to company of R400k to R550k.
3. The candidate will be expected to travel to Knysna, Port Elizabeth, East London and Johannesburg roughly twice a month (in total).
4. Annual performance-related bonuses of R50k to R200k will be paid.