



ARTICLED PLANNER

Are you a graduate looking to specialize in financial planning? Need your 3 years experience to utilize your CFP designation ?

Responsibilities

- Management and control of financial planning process
- Review and implementation of new processes
- Database management and preparation of financial planning reports//plans
- Client liaison

Competencies

- Numerate and proficient in MS Office
- Experience in spotlight financial planning package
- Skilled in web based systems e.g. blue print
- Self motivated{Professional appearance
- Good communication skills

Qualifications

- Completed or in progress CFP
- Min 1 years financial industry experience