



Title: Financial Planner
Reports to: Head: Financial planning
Based at: Johannesburg

Job purpose:

The incumbent will be responsible for providing financial planning expertise to various high net worth clients.

Outline of Key Result Areas

1. Identifying areas of risk and implementing solutions.
2. Specializing in Financial needs Analysis.
3. Responsible for recruiting new clients & relationship building.
4. Prospecting and Sales of a wide range of finance service solutions.
5. Arranging and implementing follow-up sales and service actions and ongoing support to clients.
6. Investment planning establishing a risk profile and investing funds accordantly.
7. Retirement planning for sufficient capital at retirement.
8. Estate and disability planning

Job Requirements

1. A relevant three year tertiary degree (B.Com, LLB)
2. CFP essential.
3. Minimum two years proven financial working experience within a financial services environment is essential.
4. Proven sales track record

Behavioural Profile

1. Good written and verbal communication skills.
2. Good planning and organising skills.
3. Innovative.
4. Attention to detail.
5. Analysis / problem solving skills.
6. Able to work independently and with in a team.

Salary: Highly Negotiable (Basic plus commission depending on experience)