



Title: Advice development Specialist

Reports to: Department head

Based at: Johannesburg

Job purpose:

Key duties and responsibilities

Within this strategic hub of the business you will act as the custodian of all advice related intellectual property and be responsible for the delivery of key strategic advice initiatives.

A demonstrated understanding of advice and client engagement in both the private client and institutional client space is core to the role.

Innovation and on-going maintenance and enhancements in line with international best practice are key outputs.

Must be able to engage at senior and executive level and provide input into strategic direction for advice development.

The incumbent must be able to develop a business case for new developments for presentation to the executive.

Must have in depth understanding of the regulatory and competitive financial services environment specifically in the individual financial planning / wealth management space

Project management, the ability to negotiate across functional areas and design successful implementation plans is key to successfully meeting deliverables.

Candidate requirements

- Relevant tertiary qualification (B.Proc or B.Comm preferred)
- Current CFP® member of the Financial Planning Institute
Advanced Diploma in Financial Planning would be an advantage
- At least 5 years work experience in the financial services industry with a background in some or all of the following:
 - Compliance
 - Legal advice
 - Product development
 - Investments / Linked products / Collective Investment Schemes
 - Life Insurance

- Employee benefits
 - Financial planning
- Experience in working with and understanding of Spotlight

Competencies

- Ability to work in a pressurised environment and adhere to deadlines
- Ability to collaborate and co-ordinate activities and resources in conjunction with other departments and the project office
- Proactive and self-managed (able to work without constant supervision)
- Accuracy and attention to detail
- Able to work as part of a cross-functional team with good relationship building skills
- Excellent negotiation, collaboration and conflict resolution skills
- Sound analytical skills
- Organises and presents information in a structured and logical manner
- Good project and time management skills
- Innovative and creative problem-solving skills

Remuneration

- Salary: R600 000 Depending on experience