



Articled Planner

Chartered is looking for an Articled Planner

Be part of a vibrant, passionate client interfacing company. We are one of the largest, independent financial planning practices in South Africa. We are looking for a successful candidate to join Chartered's Articled Planner mentoring programme. The successful candidate will help ensure the ultimate client experience and assist us in empowering our clients to retire successfully.

Chartered's mentorship programme is designed to enable our carefully selected Articled Planners to gain relevant and comprehensive experience within a supportive learning environment. On a daily basis, candidates are given the opportunity to develop and enhance their financial planning skills.

This proactive development process affords all candidates the opportunity of being personally mentored by one of our highly skilled CERTIFIED FINANCIAL PLANNER® professionals.

The aim of this programme is to give financial planning graduates the opportunity to gain the relevant experience to meet legislative advice requirements and attain CFP® professional status.

Minimum requirements

Qualifications

- Matric
- Post Graduate Diploma in Financial Planning or BCom Hons (Financial Planning) preferable
- We will consider BCom (Financial Planning) graduates who are currently studying their Financial Planning Honours

Experience

- Computer Literacy: Microsoft Word, Excel and Outlook.

Job specification

- Conduct administration (part of articled programme requirements)
- Learn financial planner role
- Put together compliance advice documents
- Put together minutes and financial plans and implement recommendations
- Conduct complex financial planning investigations

- Handle client query requests
- Update/load/conduct modelling on financial planning tool
- Compliance
- Complete supervision record

Remuneration

- Salaried position (cost to company with benefits), not commission earning

Please email your CV to recruitment@charterredgroup.co.za with the reference "Articled Planner".

We will only correspond with short listed candidates. Should you not hear from us within ten working days, please consider your application unsuccessful.

Learn more about us from our websites:

www.charteredwealth.co.za

www.retiresuccessfully.co.za