



Articled Planner (1-2 years' experience)

Introduction

Be part of a vibrant and passionate client interfacing company. We are one of the largest, independent financial planning companies in South Africa. Our aim is to find a skilled, determined and committed Articled Planner, who will support the lead Financial Planner in maintaining and developing the relationship with existing clients. Help us empower our clients to retire successfully.

Be personally mentored by one of our highly skilled CERTIFIED FINANCIAL PLANNER® professionals.

Minimum requirements

Qualifications

- Matric
- BCom Hons (Financial Planning) or Post Graduate Diploma in Financial Planning
- Completed Professional Competency Exam (Board Exam) preferable

Experience

- Computer Literacy: Microsoft Word, Excel, and Outlook
- Experience in using financial planning software
- Minimum 1-2 years financial planning experience

Job specification

- Write minutes and financial plans and implement recommendations
- Put together compliance advice documents
- Put together minutes and financial plans and implement recommendations
- Conduct complex financial planning investigations
- Handle client queries
- Update/load/conduct modelling on financial planning tool
- Complete supervision record
- Provide technically competent advice
- Assist planner with conducting financial planning meetings

Remuneration

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

Please email your CV to Recruitment at recruitment@charterredgroup.co.za with the reference "experienced 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