GRADIDGE MAHURA INVESTMENTS

JOB PROFILE

JOB TITLE	**Financial Advisor (Investment Specialist) - Johannesburg or Western Cape**
REPORTING TO	Chief Investments Officer

PURPOSE OF POSITION

The purpose of the Financial Advisor (Investments Specialist) role is to:

- Provide financial advice (investment, tax and insurance) to clients. Build, maintain and grow client base.

ROLES AND RESPONSIBILITIES

1. New & Existing Clients:
   - Scan client base and target market for financial planning opportunities
   - Generate leads by identifying appropriate clients/prospects
   - Contact clients/prospects to introduce or position products and service offering
   - Create interest and secure financial planning meetings with prospects/clients
   - Deliver quality financial planning and advisory services to existing and prospective clients
   - Retain existing clients and generate new clients
   - Optimise business profitability by identifying income opportunities and meet agreed income targets
   - Facilitate requirements between clients and product/service providers
   - Track and report progress of agreed implementation to clients
   - Issue confirmation of implementation to clients
   - Conduct annual reviews with clients
   - Annual new business Assets Under Management target R25 million
2. Compliance & Process
   - Agree and document services to be provided
   - Provide and explain regulatory disclosures to new/existing clients
   - Agree and sign service level agreements with new/existing clients
   - Conduct financial needs analysis for clients using business's FNA system
   - Consolidate recommendations and action steps into a financial plan
   - Source quotations for product related recommendations
   - Present recommendations, listen to clients concerns and revise strategies if necessary
   - Get clients to complete and sign all advisory documents and instructions
   - Complete Client Advice Record
3. Sales Management
   - Maintain a record of sales generated
   - Maintain a record of pipeline sales
   - Attend and present updates at internal sales meetings
   - Achieve sales target set

SKILLS AND ATTRIBUTES

1. Microsoft Office 365 knowledge (Word, Excel, Outlook, MS Teams, PowerPoint)
2. Excellent written and verbal presentation skills
3. Active listening
4. Critical Thinking
5. Professional and presentable
6. Own reliable transport
7. Interact professionally with clients and product providers
8. Perform under pressure

9. Attention to detail 10. Takes initiative 11. Ability to meet deadlines 12. Organises work smartly 13. Team player	
REQUIRED KNOWLEDGE / EXPERIENCE	Minimum 3 years in a financial advisory role, dealing with high net-worth clients.
REQUIRED QUALIFICATIONS	Post Graduate Diploma in Financial Planning Certified Financial Planner® (CFP®) and member of FPI. Regulatory Examination 5 – Representatives
SALARY	Market related basic cost to company salary plus commission Annual performance bonus incentive
CONTACT	If you meet the above minimum requirements, email your cv to info@gminvestments.co.za If you do not hear from us by 31 July 2022, please consider your application unsuccessful.