JOB DESCRIPTION INTERNAL ADVISOR (KLOOF)

JOB OVERVIEW

Provides technical assistance to the Advisors and their clients, including producing appropriate financial plans, and reviews at appropriate intervals

Skills and Attributes Required:

- Strong client service communication skills (verbal & written)
- Problem solving
- Excellent organising and planning skills
- Attention to detail
- Team player
- Ability to work under pressure
- Accept and take full accountability for actions performed
- Must be willing to learn and improve in professional capacity (i.e. relevant industry related studies)
- Ability to perform or work in a paperless/electronic work environment

Qualifications and Experience:

- Relevant degree
- Completed or studying a Post Graduate Diploma in Financial Planning

RESPONSIBILITES AND DUTIES

General:

- Prepare review schedule
- Proposals/Records of Advice (ROA)
- Review meeting preparation
- Drafting of minutes
- New business reporting
- Estate planning
- Rebalancing
- Manage workflow of Advisory assistants in the team

Administration:

- Preparation of Records of Advice for both Local and Offshore Investments and Long-Term Assurance
- Preparation of Financial Plans (Death, Disability, Retirement and Estate)
- Investment Portfolio and underlying Fund Investigations and formulating of ideas for recommendations

- Client portfolio investigations (both investment and risk products)
- Schedule and prepare for review meetings, including reviewing the meeting preparation, drafting the minutes.
- Keeping abreast of the changing tax and legal environment.
- Once recommendations are finalised with the Financial Planner, communicate with the relevant Advisory Assistant(s) for the correct paperwork to be prepared. Once paperwork is completed, ensure it is correct in accordance with the record of advice.
- Investigation of new opportunities in an ever-changing environment (such as, but not limited to, technical investigations into new products/structures/processes)
- Assist administrators, clients and financial planners with more technical tasks and relevant queries that require investigations or detailed calculations and are not process driven
- Client communication and follow up regarding all areas of the Internal Advisor’s responsibility