ADVISORY PARTNER
(Applications for Para Planner/Advisory Associate or Junior Financial Advisor would be considered.)

PURPOSE OF JOB

The role encompasses amongst other taking Citadel's service and product offering to market and engaging with prospective and existing clients.

REPORTING RELATION

Regional Head: Advisory Partner

KEY RELATIONS

External Clients, Internal clients, Leads, Financial Services Board, Financial Planning Institute, Portfolio managers, investment and asset management companies and banks, personal networks.

QUALIFICATION

Post graduate Diploma in Financial Planning - CFP

Relevant B Com degree or CA or LLB

Regulatory exam

Class of Business courses completed

EXPERIENCE

Min 5 years' experience in investment and planning environment

COMPETENCIES	KNOWLEDGE	PERSONAL CHARACTERISTICS
• Aptitude for figures • Influencing skills • Conceptual thinking skills • Interpersonal understanding • Good presentation skills • Effective stress management • Adaptable and flexible to change	• Knowledge of financial markets • Insurance and investment products • Thorough understanding and knowledge of global economy, financial and investment markets • Knowledge on investment and	• Client and service oriented • Affable character • Integrity • Quick thinker • Managerial and delegation skills • Mature • Confident • Well presented • Sensitivity to the clients

• Appropriate balance of Context and Detail orientation • Effective interaction abilities • EQ • Ability to mentor and teach	financial planning • Have good technical knowledge on related subjects such as Tax, estate planning, retirement planning and Forex, interest rates	• High sense of duty and loyalty • Wide range of interests

KPA/ STRATEGIC BUSINESS DELIVERABLES

- Building trusting relationships with new and prospective clients
- Ensure constant business development - attract new business, leads and top ups from existing clients
- Provide a financial roadmap and investment solution
- Manage client's wealth by effective advice and change implementation
- Initiate further referrals from existing clients
- Management of business practice management within Citadel, Management of Stats, inflows, FICA and FAIS and internal relationships
- Initiate prospecting events to support business inflows by building quality relationships
- Ensure clients are compliant to Houseview and adopt strategies to change implementation accordingly
- Management of portfolios under managements
- Hold bi-annual client meetings with clients
- Management and development of an Assistant
- Keep abreast of changes by attending training, networking conventions
- Retain clients

MEASUREMENT

Contribution to the overall profitability of the business via;

- New inflows from prospective clients,
- Retention of Existing Clients,
- Managing AUM and Net Flows,
- Leverage off the integrated offering across the Citadel Group.

Applications to be sent to : nishik@citadel.co.za.