

ParaPlanner

Remuneration:	R20000 - R25000 per month basic salary
Location:	Kloof
Education level:	Degree
Job level:	Junior/Mid
Type:	Permanent
Company:	PikUniq

Attention: Please note that the hiring team responsible for this position will be using the PikUniq platform for candidate screening and conducting one-way interviews.

Position: Paraplanner – financial planning

Location: Kloof, Durban

About the role: The Paraplanner supports the financial planning partner(s) in the data fulfilment and preparation of financial plans for clients.

Responsibilities:

- The paraplanner is required to collaborate very closely with the financial planning partner and assistant, as well as liaising with the regional business development manager when necessary.
- The paraplanner takes responsibility for preparing of client data, data integration, financial plan preparation, assisting with scenario planning (if competent), assisting with client reviews, assisting with records of advice, and ensuring compliance with the company's endorsed advice process (preferred advice process).
- The paraplanner is employed to operate within the company's preferred advice methodology and tool sets only.

Minimum requirements:

- Must pass the company paraplanner competency test
- 4-5 years in the financial services industry.
- Relevant tertiary education or courses.
- Exposure to financial planning.

Skills:

- Financial services industry
- Understanding of FAIS and FICA legislation
- Financial planning fundamentals and product knowledge.

Posted on 17 Apr 15:03, Closing date 16 Jun

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