

Financial Planner Job Description

written by Rory Lodge | October 21, 2020



FINANCIAL PLANNER RESPONSIBILITIES INCLUDE:

- Prepare sound financial plans to ensure clients meet their goals
- Advise clients on current financial issues and make recommendations
- Generate new business and build relationships

JOB BRIEF

We are looking for a Financial Planner to help clients manage their finances. You will be our clients' trusted advisor in areas including investments, cash flow, savings and debt management.

Our financial planner should be an effective communicator with experience in financial planning and business development. If you're analytical, meticulous and customer-oriented, we'd like to meet you.

Your goal will be to ensure clients make wise and profitable decisions to meet their financial goals.

RESPONSIBILITIES

- Analyze clients' financial statuses (e.g. income, expenses and liabilities)
- Examine and suggest financial opportunities (e.g. insurance plans, investments)
- Develop sound plans and budgets for clients
- Customize financial plans according to clients' changing needs
- Help clients implement their plans and carry out transactions
- Present and sell suitable financial products and services
- Find and approach prospective clients
- Build strong relationships to retain existing clients
- Maintain updated knowledge of regulations, practices and financial products

REQUIREMENTS

- Proven experience as financial planner or similar role; experience in sales or customer service is an asset
- Ability to analyze financial information and comply with regulations
- Proficiency in MS Office and CRM systems
- Attention to detail and strong math skills

- Strong ethics, with a customer-oriented attitude
- Outstanding communication skills, with the ability to foster long-term relationships
- Valid professional license (e.g. Series 7 & 66)
- BSc/BA in accounting, finance, business administration or relevant field; professional certification (e.g. CFP) is a plus

SOURCE: <https://resources.workable.com/financial-planner-job-description>