



JOB DESCRIPTION | SENIOR FINANCIAL PLANNING MANAGER

KEY RESPONSIBILITIES & DUTIES

- Client centricity and empathy
- Creating Financial Plans for clients
- Managing clients investment portfolios
- Conducting Risk Profiling tests to assess product suitability
- Evaluation of client goals and mapping of investments to goals
- Create a mix of right asset allocation based on clients risk profiling
- Conducting periodic reviews of Portfolios
- Engaging and establishing strong relationships with clients and ensuring superior client experience
- Be a mentor to existing team members
- Creating processes to further strengthen our client relationships
- Adhering to internal processes and guidelines to create value for clients

ACADEMIC QUALIFICATIONS / DESIRED CANDIDATE PROFILE

- Post Graduate from a premier college
- Understanding of Financial Planning concepts
- CFP, Financial Planning degree or related qualifications will be an added advantage
- Strong relationship management skills
- Process driven approach
- Excellent verbal and written communication skills
- High levels of energy and discipline
- Prior experience and excellence in related wealth management / financial planning

PRIOR WORK EXPERIENCE

3 years +