

Financial Planner

\$75,000-\$110,000+

Profile Financial Services

About Profile

Profile Financial Services is a boutique firm of financial and investment strategists, originally established in 1986. Profile holds its own AFSL, is not owned by any institution and operates at the premium end of the market, providing high-quality, tailored, fee-based, financial solutions to clients.

The role

Our planners work with internal paraplanners and client support officers to provide high quality financial advice to clients. Starting with a client base of existing Profile clients, you will prepare and run effective annual and half yearly reviews: managing tasks, documentation and follow-up via a fully online workflow management system. You will introduce new clients by building relationships with existing centres of influence, participating in Profile's marketing programs, and developing your referral sources. Maintaining a high standard of technical knowledge is also expected.

Is this you?

You must have a genuine interest in people and find great satisfaction in helping clients achieve their financial goals. You have very high personal standards of integrity, and enjoy the challenge of designing financial strategies to meet client needs across investment, insurance, superannuation and estate planning.

You are RG146 compliant, with tertiary qualifications in economics, business or a related discipline. You have completed or have made significant progress to completing the DFP. You have several years experience advising clients – or perhaps you are an experienced paraplanner looking to make the move to planning. Alternatively you might be an experienced planner looking to realize the value of your existing client base now, while continuing to work for a number of years ensuring your clients are looked after (without the hassles and overheads of running a business as well).

Presentation skills and experience using Xplan would be favourably regarded.

The total remuneration package includes base salary and super, with generous bonuses based on your ongoing review fee base, and new clients introduced. Profile financial planners are employees, with the potential to progress to Senior Financial Planner and acquire an ownership share in the firm over time.

No agencies please.

To express interest in the role, please send your CV to sarah@profileservices.com.au

