



VACANCY: Financial Advisor Stepp Bella Rosa Office

Qualifications & Requirements

- Qualified B. Comm/CA/BSc or CFP
- FAIS Compliant (NQF level 5 and with adequate unit standards to qualify for FSB registration as representative as defined in the FAIS act).
- 2+ years' experience in the financial services industry.
- Understand Collective Investment Schemes, Retail Retirement Fund Industry and Wealth Management.
- Expert on Microsoft Office (Word, Excel, Outlook, PowerPoint).
- Proven sales track record and notable accolades.
- Building strong relationships.
- Educational or experience background to include tax training.
- Driver's license required and should be willing to travel.

Responsibilities

- To generate leads, set up appointments, meet clients and close the deal.
- Service existing clients.
- To prepare and present a recommendation or solution to the client, implement, review and monitor on an ongoing basis.
- To obtain all necessary documentation (FICA documentation).
- To ensure all associated administration is completed in an effective manner to meet the group's compliance and regulatory requirements.

Interested? Apply at roland@stepp.co.za today. Should you not hear back from us within 10 working days, please consider your application as unsuccessful. We will retain your credentials for future similar roles.