

This Financial Adviser job description template includes key Financial Adviser duties and responsibilities. You can post this template on job boards to attract prospect applicants.

Job Brief:

We are looking for a financial adviser to act as an intermediary between our company and customers. You will provide to our clients financial guidance and make recommendations on how to best utilize their money. The ideal candidate will be able to research marketplace on available products and services, identify customers' needs, design financial strategies and close a sale.

Responsibilities:

- Provide strategic advice across a variety of financial products and services (debt management, cash management, insurance coverage, investments)
- Assess client's overall financial picture, understand their needs and develop a solid financial plan
- Guide clients towards a profitable and secure financial decision
- Cultivate client base and build win-win relationships
- Network, generate leads and grab opportunities to sell mutual funds, stocks, bonds etc to meet sales quotas
- Keep abreast of new industry's trends and research market to back up financial consulting
- Oversee the course of the financial plan and update it, if necessary, to ensure profits
- Comply with all industry rules and regulations
- Liaise with providers, solicitors, valuers and other professionals

Requirements:

- Proven working experience as a financial adviser, controller, planner, specialist or relevant experience
- Track record of successful financial guidance

- Ability to analyse market's financial data and to provide appropriate data-based advice
- Strong communication, negotiation and presentation skills
- Accuracy, attention to detail and the ability to explain complex information clearly and simply
- Excellent PC knowledge and ability to operate database systems
- Current certificate of qualifications (FCA, CII, DipFA, CISI or other)
- BS degree in Finance or related field