

PARAPLANNER

Sharenet is a leading financial trading and investment company, founded in 1988, based in Cape Town, South Africa with a branch servicing the greater Gauteng area. We view each and every staff member as not just as an employee, but a valuable member of an integral team. At Sharenet we encourage team work and we choose the best to work in our young and vibrant Company. Our clients are one of our biggest assets and we strive to ensure that by employing the very best candidates, our customers come back to us again and again. With our 28 years in the industry, we aim to attract the very best candidates. Sharenet promotes an environment of ambition and empowerment in your respective job role.

Come and join a fresh and dynamic team to learn about the world of Asset Management, Securities and Trading Platforms incorporating financial risk management and fiduciary services.

LOCATION:

Northern Suburbs (Sandton), Gauteng

JOB CLASSIFICATION:

Permanent

JOB TITLE:

Paraplanner/Administrator

QUALIFICATIONS:

Bachelor's Degree in financial/Investment Management, Accounting, Economics or similar
Post Graduate Diploma in Financial Planning (CFP) or studying towards (advantageous)
Minimum 6 months experience on Elite Wealth or similar software (advantageous)

SYSTEMS KNOWLEDGE:

Elite Wealth

PRINCIPLE DUTIES AND RESPONSIBILITIES:

Gather financial reports and records/needs analysis from the client
Perform proposals and other reporting to clients
Research financial databases and products that match clients' needs
Asset Allocation, pre and post retirement planning, estate planning, risk proposals, etc
Client relationship management including maintenance of the database for compliance and reporting purposes
Establish and build strong relationships with clients
Assist with daily administrative task such as FICA compliance, CRM, portfolio transfers, etc

IMPORTANT ATTRIBUTES:

Understanding of the Financial Planning process
Ability to work within defined business processes
Ability to achieve agreed outcomes without supervision
Ability to cope under pressure
Excellent verbal & written skills
Excellent computer literacy (Excel - advance)
Proficiency in English and Afrikaans is extremely important
Prior work experience in a similar role (advantageous)
Presentability and friendliness with clients is a must
Valid driver's licence with own transport is essential
An ability to manage their own time and deliverables
Team player

Remuneration will be discussed directly with successful candidates at interview stage.

When applying for this position, please ensure that you have the minimum job requirements. Only SA citizens will be considered for this role. If you are not in the mentioned location of this position, please do not apply. You will not be considered for this role.

FOR SN JHB TO ADVERTISE

If you are interested in this position and meet the above criteria please contact Martin Strauss on 010 – 006 0019 or email your CV and cover letter to: martin@sharenet.co.za