



Proventus Capital is currently recruiting for a Certified Financial Planner® EE candidate
Benoni/Gauteng

Lifestyle Financial Planning and Employment Benefits

Permanent

Advisory fee remuneration

PURPOSE OF THE ROLE:

- Responsible to assist and empower clients to achieve their lifestyle and financial goals by initiating a (lifestyle) financial planning discussion.
- To uncover clients future goals (both personal and financial).
- To provide future fit advice, conduct a holistic financial needs analysis and present appropriate solutions to new and existing clients.
- Responsible to build a client centric practice through prospecting and referrals, Proventus Capital will also provide the candidate with a current client base together with a revenue from this client base, applying best practice principles as provided by the practice, maintain long-term business relationships with your clients, review and revise the plans as required on an ongoing basis and ensure the practice complies with FAIS and other related legislation.
- Accountable for the advice provided the advice process and adherence to standard compliance legislation.

QUALIFICATIONS:

- CFP designation
- Preferably RE1 & 5

TECHNICAL SKILLS AND EXPERIENCE

- 2-3+ years financial planning experience

BEHAVIOURAL COMPETENCIES:

- Customer focus
- Teamwork
- Building relationships
- Results driven
- Applying professional, technical expertise
- Entrepreneurial thinking
- Relating and networking

Contact details for CV: info@proventuscapital.co.za