

Unit Team Leader/Senior Para Planner

Purpose of the Job

1. To manage and lead a small team of sales and administrative staff ensuring that the unit's sales and operational objectives are met efficiently and effectively.
2. Manage the Sales team activities and performance. Set individual sales targets and ensure sales targets are met through coaching and training of individuals.
3. To manage the life and investment book of the Executive Financial Advisor (EFA)
4. To serve as the primary contact for the EFA, the clients, other key stakeholders and manage the information flow in, and out of the unit.

Responsibilities

1. Assist the Executive Financial Advisor (EFA) to **interpret and align the Unit's goals and activities**.
2. Provide direction to the Unit team members to achieve the Unit's goals and establish and maintain tracking system to track performance relative targets.
3. Manage unit ensuring systems and procedures are complied with and complaint.
4. Regular **performance reviews** with Unit Team members to be compiled.
5. Prepare **proposals and financial needs analysis**
6. Perform **new business environmental scans** (geographic, economic, and socio-economic).
7. Stay informed about **industry and legislative shifts** as well as new products
8. Provide quality client service, effectively responding to and handling complaints and enquiries.
9. Assist with **portfolio updates** on the Financial Planning System.
10. Assist with the preparation of **client review reports**.

Key Requirements

QUALIFICATIONS AND EXPERIENCE

- Matric or equivalent of Senior certification.
- Bachelor's degree in financial planning or relevant qualification at NQF 6 level.
- A Certified Financial Planner (CFP®) will be an advantage.
- Regulatory Examination Level 5: Representatives.
- 3 to 5 years' experience in the financial industry/insurance is preferred.

SKILLS AND COMPETENCIES

- Demonstrated advanced Excel skills. **(This is considered a critical job skill)**
- Demonstrated minimum intermediate level of Word, PowerPoint, and Outlook skills.
- Strong written and verbal communication skills in English.
- Solid financial and business acumen.
- People orientated and ability to manage teams/entrepreneurs.