

ADVICE INDUSTRY TALENT



FINANCIAL PLANNING AUSTRALIA

YOUR HOME FOR INSIGHTS, RESOURCES & OPPORTUNITIES

RECRUIT 2 ADVICE

SENIOR FINANCIAL PLANNER / ADVICE LEADER / BOOK \$50K

REF# NSW1941

Senior Financial Advisor and leader with 12 years experience specialising in SMSF strategies and geared investments, Proven track record engaging clients, delivering cash flow modelling and holistic financial advice for busy professionals & HNW clients.

Utilises knowledge and experience to foster team engagement and drive business revenue.

Locations: Sydney CBD, Inner metro

Female CFP, Sydney \$120-130K

- BA Bus. SPAA/SMSF
- NEW Business focused
- 9 Years in Industry

Demonstrated ability to engage HNW, Business, Executive clients. Motivated to drive new clients and new revenue. Formative Referral Partners. Highly Educated, All – Rounder.

Locations: Sydney CBD, Inner East/West REF# NSW1905

Private Clients - \$500K+ Book

- Investment Specialist
- 10+ years relationships
- Equity or JV considered

Polished investments professional. Retail and HNW clients. Seeks IMA & transition support to reset on UHNW, Asian, and Wholesale investor market.

Locations: Melbourne CBD REF#MLB1910

CFP, SMSF Sydney \$120-130K

- BA Economics, SMSF accredited
- Book \$25k
- New Business & Client retention skills

Astute, engaging, client first approach. Managed business for 5 years, seeks good long term role. Demonstrated commercial abilities. Suits IFA or mid tier firm.

Locations: Sydney CBD REF# NSW1925

Male CFP, Sydney \$130K

- Private Client Adviser
- 10 Years in Industry
- HNW, Executive, Affluent Advice

High Performance record. Experience managing existing & new business clients. Equities, Investment, Insurance. Astute relationship manager. Double Degree Quals.

Locations: Sydney CBD, Inner West, Hills REF# NSW1913

Private Clients - Associate \$90k

- Investments / Wholesale Investors
- BA Com. CFP, TPF
- 3 Years Client facing experience

Mature young Adviser, Strong Quals & Experience. Seeking role supporting Senior Investment Specialist. Standout up and comer, demonstrates all traits of success.

Locations: Sydney CBD REF# NSW1928

GM Advice \$150k +

- BA Bus, CA, Grad Dip FP, Grad Dip Mgt
- 20 Years Industry / Licensee exp.
- Adviser & Operational Management

Industry profile, Extensive Adviser, Accountant, Alliance Relationships. Demonstrated capability & success Alliance Distribution and Licensee Adviser network.

Locations: Sydney CBD REF# NSW1907