

# ADVICE INDUSTRY TALENT

JANUARY 2020



## FEMALE CFP, SYDNEY - 130K - WITH BOOK

Senior Financial Advisor with 10 years' experience in wholistic advice and wealth management. SMSF, pre and post retirement, accumulation, and risk management. Exisiting clients to transition. Strong focus on relationships and education for her clients. Experience covers IFA sector and business management. Locations: Sydney CBD, Parramatta, South Metro

## Advice Manager / AFSL circa \$150K

- MBA, CFP, BBus
- Client Advisor & Advice Management exp
- **NextGen Leadership**

High net worth, affluent accumulators and everyday Australians. Driving strategy and performance, change manager, leader, proven implementer.

Locations: Sydney CBD

## Female Advice Leader \$160k

- BA Ec, CFP, SMSF
- 15 Years exp
- Strategic Advice HNW

Broad advice strategy, technical and policy leader. Tax, super, asset protection, estate planning, succession planning, insurance, aged care.

Locations: Sydney CBD

## Private Clients - Associate \$90k

- Investments / Wholesale Investors
- BA Com. CFP, TPB
- 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

## BDM - Asian HNW Investors

- Investments / Wholesale Investors, RG146 - Tier 1
- Demonstrated Success- Inflows
- Mandarin / Cantonese

Ready to bring network of direct investors, plus extended network in Asia/Australia of bankers, accountants and lawyers. High level relationship builder - Asian market specialist - Multilingual.

Locations: Brisbane CBD

## Risk Adviser \$110-120k

- Strong client engagement skills
- Passion for Insurance
- Ambition – Highly driven

Experienced in Medical sector, plus white collar professionals and business owners. Strong Insurance skills up to Key Man, average premium circa \$6k.

Locations: Sydney CBD, Norwest

## Female - Senior Risk Adviser \$140k

- 10 Years' Experience, CFP 1-4
- SME – Business Succession Specialist
- Relationship focussed

Service focussed Insurance specialist with working knowledge of business partnerships, accountants / solicitors and strong industry network.

Locations: Sydney CBD

## Female Private Clients \$110k

- BBus, Grad Dip FP, Masters App Fin current
- Sales & Relationship Professional
- High Energy, Commercial focus

Dynamic ambitious professional , strong communication and relationship building skills, currently seeking a career in private bank/private wealth management.

Locations: Brisbane CBD, Inner metro

## Senior Advisor \$110k - with Book

- SMSF, ADFS
- 5 Years Senior Advice exp
- Strong Compliance Skills

Fee for service covering white collar professionals, business owners and mass affluent. Broad client types and advice experience. Book of loyal clients (10-15) will transition paying fee for service.

Locations: Nth NSW / Gold Coast