

ADVICE INDUSTRY TALENT

R2A

FINANCIAL PLANNING AUSTRALIA

YOUR HOME FOR INSIGHTS, RESOURCES & OPPORTUNITIES

RECRUIT 2 ADVICE

SEPTEMBER 2022



SENIOR ADVISER (CFP) | MENTOR | MELBOURNE | \$150K

Masters FP, CFP, SMSF - Private Client Relationship Manager - Advice Leadership and Mentoring
Seasoned relationship manager with HNW, SMSF, NFP, Trustee experience. Advanced Investment and Strategic advice capabilities. Boutique & Insto experience. Mature professional to nurture clients and mentor advice team. Ref: #2041

Private Clients | (CFP) | Sydney | \$140k

- Ba AF, Ba EC, Masters FP, CFP
- HNW, SME, Executive Clients
- High Achiever – Huge Potential



Mature young Adviser with demonstrated relationship and strategic advice capabilities. Formative professional network, commercial drive, and success orientation.
Ref: #2042

Senior Adviser | Sydney | \$150+

- Masters AF, Ba Acc, SMSF
- HNW affluent market specialist
- 10 Years Experience

Proven business writer with wholistic & strategic advice and relationship management capabilities. Passionate, service ethic, delivery, compliance and engenuity.
Ref: #2088

Financial Adviser | Sydney | \$150k

- Masters FP, ADFP
- Holistic 'Accumulator' specialist
- High Energy, Commercial focus

Dynamic ambitious professional, strong communication and relationship building skills. Broad client experience includes SME and Executive Clients. Relocating Sydney.
Ref: #2045

Financial Adviser | Perth | \$130k

- Ba Com, CA, DFP
- SMSF - Accounting & Advice specialist
- Ambitious, Polished, Mature - 'Next-Gen' Adviser

Demonstrated relationship management (review) and new business skills. Proficient in Investment Strategies, Asset Allocation, Cash Flow modelling, Insurance and Financing within SMSF's.
Ref: #2046



Senior Adviser | CFP | Parramatta | \$150k

- Masters FP, CFP
- 10+ Years Experience - leadership
- Broad Holistic advice



Mature stable advice professional with extensive relationship management experience, consistent achievement of targets, mentoring and coaching capabilities.
Ref: #2047

Senior Adviser | Sydney | \$150k

- Ba EC, ADFP, SMSF
- Client Advisor & Advice Management
- New Business Writer

High net worth, affluent accumulators and everyday Australians. Driving strategy and performance, change manager, leader, proven implementer. Ref: #2048