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WE ARE *Hiring* Paraplanner

A Paraplanner or Financial Strategist is responsible for completing non-client-facing tasks involved in preparing a Financial Plan/ Strategy for a client. In this role, you will be able to crunch numbers and analyse tax laws and legislation to come up with strategies to help clients maximise wealth, reduce tax and plan for the future

- Preparing Statement of Advice documents and updating Statement of Advice templates
- Preparing Record of Advice documents, financial planning file notes and personal insurance cover quotes
- Performing financial modelling
- Comparing different financial planning modelling scenarios for clients
- Entering client data into financial planning software (popular software programs are COIN, Xplan & Midwinter)
- Review client documents related to investment strategy and portfolio re-weighting

No Experience Needed

TRAINING IS PROVIDED

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Financial Planning Assistant

A Financial Planning Assistant (FPA) is an admin assistant role that aims to provide high-quality work to clients by paying close attention to detail, providing a quick turnaround for completion of tasks and being proactive and responsive to client requirements. An FPA is responsible for administrative tasks coupled with preparation of insurance premium quotes and estimates.

- Setting up client files and adding client data to the financial planning software
- Preparing product comparison reports which involve digital correspondence with insurance and investment companies to gather specific client portfolio information
- Typing up client questionnaires & portfolio reports
- Preparing forms, documents, templates
- Preparing insurance premium estimates and quotes using specific software
- Preparing application forms, reports & mindmap presentations
- Managing database in CRM system
- Submitting application forms and following up applications, insurance underwriting, medicals etc.

No Experience Needed

TRAINING IS PROVIDED

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Mortgage Broking Assistant

A Mortgage Broking Assistant is an admin assistant role that works alongside mortgage brokers, helping to coordinate communication and other interactions among title and mortgage companies, real estate agents and escrow agents.

- Closing files – providing compliance checks of files, ensuring all items are on file and follow up missing data
- Data entry into Mortgage Broking software/s
- Ensuring accurate client information post loan implementation
- Monitoring team in boxes and distributing email
- Updating loan product providers with our current contact information
- Following up outstanding loan information from banks
- Seeking updates on loan deals from banks
- Performing Loan Review Health Checks

No Experience Needed

TRAINING IS PROVIDED