

VACANCY:

FINANCIAL PLANNERS – Momentum Financial Planning

Introduction:

In our strive to become the most competitive, accountable, and professional in-house financial planning advice business in Namibia, Momentum Financial Planning (MFP) is looking at establishing an expansive and high-performing community of professional financial advisers to sustainably build MFP towards a prosperous and rewarding future.

Are you considering a career in financial planning? You can make a positive difference in people's lives by guiding them to financial security and impacting their future with advice on how to manage their money throughout their lifetime.

Duties & Responsibilities

Accountabilities:

- Source, develop and grow your own individual, private & corporate client base through networking, prospecting & referrals.
- Meet clients in person to provide financial planning advice.
- Manage and strengthen internal and external relationships.
- Provide on-going advice to existing clients to promote and assist retention.
- Resolve client concerns, queries & complaints.

Job requirements

Formal qualifications

Matric/Grade 12
A Tertiary degree or qualification
Relevant, industry specific qualifications (CFP, CFA)

Importance

Essential
Advantageous
Advantageous

Other requirements

Own vehicle and a valid driver's licence
Own smartphone and laptop as required by the job
Ability to work independently
Ability to network and build relationships
Career driven individual with strong entrepreneurial skills

Importance

Essential
Essential
Essential
Essential
Essential

Experience

Prior industry related experience and knowledge
Experience in financial advice rendering role

Importance

Desirable
Desirable

Contact details:

Momentum Metropolitan contact person:

- Human Capital department
- 061 2973129
- recruitment@mmltd.com.na

Vacancy closing date: 31 / 07/ 2020

Please include the following with your application

- Detailed CV
- Copy of identification book (ID)
- Evidence of qualifications
- Evidence of industry related experience

The logo for Momentum Financial Planning, featuring the word "momentum" in a white, lowercase, sans-serif font, centered within a red, curved, semi-circular shape that resembles a stylized wave or a partial circle.

momentum