POSITION DESCRIPTION	
Position Title	**Financial Planner**
Reports to	Partner in Charge
Position Overview	You are looking to work for a growing business, become part of the management team and have a desire to become a part owner of the business. You're a team player, you respect team members & their role in the team. You look to lead others with empathy and support. You are passionate about financial advice and providing an exceptional client experience. You want to assist clients in achieving their financial and life goals / objectives through providing holistic financial advice that includes, but which is not limited to: • Wealth creation strategies • Retirement planning • Superannuation, including SMSFs • Wealth protection (personal insurances) • Estate Planning
Essential Qualifications & Experience	Completed ASIC education requirements (or on track to complete within legislated timeframes). Strong Technical knowledge and experience in; financial markets, managed investments, listed securities, personal risk insurance, all aspects of self-managed superannuation and investments. Minimum 3 years' experience working in a professional financial planning position or practice, with demonstrated ability in key areas such as: strategy formulation; teamwork and client care. Working knowledge of Information Technology requirements and applications. Excellent written and verbal communication skills. Demonstrated ability to inspire, educate and influence clients. Must have premanent residency in Australia.

Task Responsibilities	
Client Service	Develop an in-depth knowledge of clients financial situations and goals. Take pro-active steps to anticipate client needs and concerns. Deal with client enquiries and provide additional service as required. Ensure clients consistently receive service excellence in line with our service standards.
Financial Planning	Conduct consultations with clients or prospective clients to complete a full financial needs analysis and present appropriate strategic recommendations according to the client's individual circumstances and needs. Implement appropriate investment strategies in accordance with our procedures and regulatory compliance standards. Regularly review client's portfolios and circumstances and provide evidence to ensure the portfolio continues to meet their objectives. Maintain appropriate accreditations. Provide input into systems reviews to ensure that the financial planning division operates as efficiently as possible. Contribute to the development and refinement of our procedures. Promote service offerings to clients/prospective clients and employees.
Supervision	Review work of other team members in their initial and ongoing involvement in investment applications and preparation of advice documents. Actively contribute to the ongoing professional development of team through mentoring team members in your area of expertise. Assist RMFP Partner to supervise the team as required.

Business Development	Pro-actively identify opportunities in and outside the client base. Generate referrals from your existing client base. Foster strong working relationships with business partners to assist building client base through their referrals. Generate new business through wealth creation education programs, seminars or events for existing and potential clients. Assist the Partner to develop and action our business plan.
Professional Development	Pro-actively manage your personal and professional development. Participate in ongoing training programs including those held by the Licensee. Remain up to date and informed of all relevant developments of Licensee and ongoing market and legislative developments.
Key Performance Indicators	KPI's and performance targets will be set during business planning and performance appraisals. Targets may be adjusted as required by RMFP.

General Responsibilities and Expectations

- Be familiar with and adhere to our Policies and Procedures.
- Be familiar and promote our values at all times.
- Communicate professionally with clients and colleagues and miantain the highest level of confidenitality at all times.
- Build positive productive working relationships internally and externally, while possesing a possitive and mature attitude to the role.
- Demonstrate a commitment to efficiency and continued professional development by attending and actively participating in training, taking responsibility to seek self-development opportunities & keeping up to date with technical matter.
- Conduct your business in compliance with ethical practices.
- Monitor and adhere to procedures and workflow deadlines.
- Attend/support relevant our related events.
- Follow all reasonable instructions of Managers, Partners and the General Manager.

Agreement to this Position Description

I have read and understood this Position Description.

I understand that this document provides general information and that it may be altered at any time at the discretion of the Firm.

I agree to perform to the best of my ability and to deliver the responsibilities described in this Position Description, in accordance with Firm policies and procedures and all reasonable Manager, Partner and the General Manager directions.

Agreed by:

Employee	**Signature**	**Date**

Signed on Behalf of Roberts and Morrow:

Name	**Signature**	**Date**