

ADMINISTRATIVE CONSULTANT

Location: Mowbray, Cape Town

Start date: As soon as possible

Masthead Financial Planning, a national Financial Services Provider, is offering an exciting opportunity to someone with an experienced background in administration in financial services.

Duties of the role include:

- Onboarding and providing ongoing training to financial advisors.
- Audits of all new business based on internal requirements in terms of FAIS and FICA.
- Maintenance of FSP compliance requirements.
- New business audits and conservation.
- Ongoing day-to-day administration.
- Reconciling of financial statements, payments of commission and monthly finance reports.
- Playing a key role in assisting Key Individual identify operational risks.
- Dealing with day-to-day advisor queries in a timeous manner.
- Liaising with third-party suppliers to ensure systems are in place and being delivered to advisors effectively.
- FNA and CRM support via Xplan system.
- Maintaining relationships with a panel of financial advisors using a segmentation approach.

Key Competencies and skills

The ideal candidate must be fluent in Afrikaans, be able to work under pressure, be a fast learner with a passion for work and have good communication skills (verbal & written) as well as excellent phone manner. They must be willing to go extra mile; have a very high level of motivation and commitment; and be a team player willing to work within a small team. They should also display gravitas & emotional maturity; be open, friendly, and approachable with excellent interpersonal skills; organised with excellent diary and time management skills; and be neat, tidy, presentable, and professional in appearance and manner.

Qualifications and Experience

Grade 12 plus 3-5 years' experience within a similar financial services operation.

How to apply

- Please send your CV to info@mastheadfp.co.za if this position interests you.
- The application deadline for this vacancy is: **15 November 2023**

Applicants who do not meet all requirements will not be considered. Applicants who do not hear from us within two weeks should consider their application unsuccessful.
