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# Example of Financial Adviser Job Description

Our company is looking for a financial adviser. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for financial adviser

* Completing application paperwork
* Preparing illustrations for clients
* Assist with maintenance of CRM database, including updating client information, oversight of record-keeping practice/data governance
* Produce various reports needed by the business
* Coordinate email campaigns through CRM
* Manage marketing and events material, including upkeep of in-house stock, coordination of print runs, and logistics of large scale mail-outs
* Liaise with Corporate Services to support both in-house and external client events
* Coordinate and plan travel arrangements with FAS and Corporate Services
* Screen and direct incoming calls
* Manage and maintain an electronic filing system for FAS

## Qualifications for financial adviser

* Good computer literacy (MS Office application) and excellent organizational, communication, writing and teambuilding skills
* Minimum 1-2 years face-to-face financial advice experience
* Minimum degree and ADFP qualifications and preparedness to complete your CFP
* Minimum of 12 months experience working in Financial Services or Financial Planning in a client services type role
* Sound technical and legislative knowledge across all areas of advice
* Generic Knowledge