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# Example of Financial Adviser Job Description

Our company is growing rapidly and is looking for a financial adviser. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

## Responsibilities for financial adviser

* Lead client pitches and to negotiate with senior executives to secure new clients in line with agreed targets
* Achieve and grow an existing portfolio of clients to agreed income targets and objectives
* Proactively liaise with the wider Marsh & McLennan Companies business areas to provide subject matter expert guidance in developing the Mercer Jelf Financial Planning service and proposition to meet ongoing client needs
* Establish and take the lead role to implement growth campaigns as appropriate with regional leaders across the Marsh & McLennan Companies group
* Achieve lead generation growth in line with productivity targets
* Proactively provide accurate reports incorporating activity and results and to update and maintain all records held within the Core system
* Work closely with relevant support teams to provide excellent service to clients and to proactively act as a mentor for more junior members of the team through demonstration of role model behaviours
* Maintain and proactively develop technical knowledge and understanding of regulatory changes affecting recommendations including CPD to ensure subject matter expert status within specialist area of the financial planning business
* Have direct responsibility for key client relationships and interactions as directed by the Head of FAS in a specific territory
* Sales leadership and management of a territory composed primarily of fee-only, high net worth Financial Advisers

## Qualifications for financial adviser

* CRM experience required, Microsoft Dynamics a strong plus
* Self-starter who is capable managing multiple projects and meeting tight deadlines
* Excellent written and verbal communication skills in English, additional languages would be a plus
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* Ability to develop and sustain strategic global relationships between internal clients and external business partners
* Ability to impact and influence others across the organisation