



Example of Financial Services Consultant Job Description

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Our company is hiring for a financial services consultant. 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 services consultant

- Handling and processing incoming calls in an efficient and professional manner
- Ensuring that any data is accurately captured
- Managing issues efficiently and resolving these to conclusion
- Keeping up to date with business knowledge to ensure clients receive the best possible service and support
- Gain understanding through effective questioning and listening techniques
- Achieve targets for quality and utilisation including service standards on an individual and team basis
- Adhering to the Data Protection Act, and working within a regulated environment
- Management and upload of service opportunities within Salesforce and assess solution fit and risk involved
- Define winning strategy and probability to win
- Review and submit proposals internally for bid review and opportunity qualification externally to the client for contract and order management

Qualifications for financial services consultant

- A minimum of 3 years or in a financial services
- A keen sense of humour

- FINRA 6 and 63 registrations state life insurance licenses must be obtained through our Academy program
- Knowledge of industry including competitors and trends (i.e., knows what it takes to be successful in the financial services industry)