Example of Wealth Planning Job Description

Our innovative and growing company is looking to fill the role of wealth planning. To join our growing team, please review the list of responsibilities and qualifications.

Responsibilities for wealth planning

- Ensure timely and accurate sales result tracking for performance management
- Develop and maintain program logic for sales result tracking and sales incentive calculation
- Work closely with business to design relevant sales reports or tools to drive sales productivity and formulate core and tactical sales incentive program to drive desired sales behavior
- Provide analytical support on evaluating effectiveness of sales incentive plan and tactical incentive program
- Ensure timely and accurate sales incentive payout calculation and end-to-end sales incentive payment process is seamless and error-free
- Preparation of benefits illustrations and client presentations (direct sales model)
- Coordinate and arrange RM training liaising with Finance depart, external brokers, partners
- Liaise with FI on counter party limits and with Credit on financing policies
- Ensure full compliance with relevant laws and regulations in all jurisdictions
- Other admin duties as delegated by Supervisor

Qualifications for wealth planning

- Exceptional ability to manage one’s own time and organize work load and priorities to ensure the meeting of deadlines

- Bachelors degree with demonstrated analytical and critical thinking skills
- The right candidate will have excellent planning and organisation skills excellent attention to detail
- The successful satisfaction of a CFP® designation is required or expected to be achieved within 12 months of hire
- Knowledge of SunTrust platform technology is preferred