



Job of the Week

#31

FINANCIAL ADVISOR

A Financial Advisor provides advice on money management, savings and investments for both individuals and companies. They can specialise in different areas depending on what their clients want, for example pension schemes and mortgages, or they can be more generalised. Financial Advisors are responsible for contacting clients, holding meetings both over the phone and face-to-face. They are also responsible for reviewing clients' financial circumstances, designing strategies to help clients, negotiating the best rates and producing reports.

Skills

- *Communication & Listening Skills*
- *Ability to explain complex information*
- *Networking & Building Relationships*
- *Research & Analytical Skills*
- *Negotiation & Influencing Skills*
- *Determination & Tenacity*
- *Admin, Report writing, IT & Numeracy*
- *Customer Service*
- *Discretion & Client Confidentiality*
- *Ethical & Professional Approach*

Key Info

Salary

£
 Trainees: £22,000—£30,000
 Qualified: £30,000—£45,000
 Senior Advisors: £60,000
 Private Practice: £100,000

Routes

Post 16 & Further Education
 Experience in Sales & Customer Service or Finance
 Graduate or Apprenticeship Scheme

Working Hours

At a Bank or Estate Agency:
 35—40hrs per week including Saturdays. Evenings & Weekends in Contact Centres

Qualifications

GCSEs (9-4)
 Post 16 studies: Accountancy, Financial / Business Management Related Degree (desirable not essential)

Labour Market

Finance Professionals:
 UK: 385,074 Gateshead: 1,048
 UK Growth: +11.8% (2027-27)
 NE Growth: +13.5% (2017-27)

Related Careers

Investment Banker
 Bank Manager
 Investment Fund Executive
 Financial Accountant

More info: UNIFROG



National Careers Service



School Website

