

VACANCY

UNIT TRUST CONSULTANT- GAUTENG

CORE PURPOSE OF THE JOB

To advise, promote and sell:

- the Old Mutual Al Baraka Shariah Unit Trust funds as well as other Shariah compliant unit trust products
- Sharia compliant Pre and post retirement products to both individuals and businesses.
- Advisory and training support to Albaraka Retail Branch consultants in respect of Sharia compliant Unit Trust Products

KEY PERFORMANCE AREAS

Ensure that the targets set for the region are met

- Conduct sales of the unit trust and retirement products by providing clients with efficient service and professional advice on the product.
- Ensure that all applications forms are completed and correspondence is provided to the Client.
- Cross - sell other products of the Bank as and when sales leads present itself.

Marketing and advertising of the unit trusts and retirement products

- Actively market the unit trust and retirement products to potential clients
- Engage in marketing activities hosted by the Bank
- Ensure that regular contact sessions are held with Clients, thereby keeping them abreast of their investment/retirement portfolios and explore further investment opportunities with Clients.
- Identify and attend public functions as a Unit Trust Division representative of Al Baraka Bank

Customer Services

- To communicate with Al Baraka Bank Clients with regards to updates / product information on an ad hoc basis
- Provide effective resolution to Client queries and complaints.

Financial Planning Experience

- To provide advice and sales of investment products particularly unit trust and retirement products.

PREFERRED QUALIFICATIONS

- An accounting / finance qualification
- Diploma in financial Planning or Wealth management
- Must be FAIS compliant and preferably KI
- Valid driver's licence

PREFERRED EXPERIENCE

- At least 2 years' experience in financial planning and Investment management
- Experience within the insurance / unit trust industry in an advisory role
- Experience in Wealth management would be an advantage
- Proven track record of marketing and sales
- Banking experience will be an advantage

SKILLS REQUIRED

- Good interpersonal skills
- Excellent communication skills both written and verbal
- Excellent presentation and selling skills
- Excellent planning and organising skills
- Strong customer service orientation
- Task orientated
- Able to meet targets
- Ability to work under pressure and meet deadlines
- Able to multi-task
- Able to prioritise tasks

KNOWLEDGE REQUIRED

- Shariah law applicable to insurance / unit trust / retirement products
- In depth Unit trust and retirement product knowledge
- Financial planning

Kindly forward your CV to hr@albaraka.co.za