# Financial Planner

## About us

**Murray Nankivell** is a privately owned and run business in Regional SA. Murray Nankivell provides a broad range of professional services across Accounting, Business Consulting and Financial Planning. We are an Authorised Representative of the Lonsdale Financial Group who hold an Australian Financial Services Licence.
Murray Nankivell are committed to forming close partnerships with our clients, enabling us to understand their unique situation and customise the assistance we provide to suit their requirements.

## Why join us

- Exceptional income potential - we offer up to $120,000 per annum
- We have a strong focus on maintaining a healthy work/life balance for our team; we understand that we all have lives outside of work.
- We are an extremely successful firm, with a large and high-quality customer base. This enables us to provide direct referrals from our accounting customer-base

## About the role

We have a great new opportunity for a passionate and highly driven **Financial Planner** with direct equities investment and SMSF experience, to join our team. As the new addition to our team, you start with us in **Naracoorte** for the initial 12 months. It will be possible to re-locate to Murray Bridge or Bordertown after that 12 months.

The successful candidate will be able to travel to main offices and visiting offices across Murraylands, South East and Western Victoria.

You are not required to bring new clients, but to succeed in the role, you will have the ability to source new clients.

## Key responsibilities

- Collaborate with financial planning and accounting teams to identify opportunities and provide holistic wealth advice to clients with a variety of wealth needs
- Undertake quality consultative conversations with clients to understand their needs and provide personalised financial advice
- Assist clients with often complex decisions around the best way to protect and grow their wealth and structure their investments
- Active involvement in business development and new opportunity identification by prospecting internal and external networks to grow new business
- Strict adherence to Risk, Compliance and Advice processes and protocols

## About you

*Minimum educational requirements*

- Undergraduate or postgraduate degree qualification that meets the requirement of FASEA

*Practical experience*

- Minimum 5 years of financial planner experience providing holistic advice to clients (face-to-face)
- Must have experience with SMSF and direct equities investments

*Knowledge and skill*

- Solid understanding of tax, superannuation, retirement income streams, investments and social security
- Good knowledge of retirement strategies, direct equities, managed investments and personal risk/insurance advice
- Excellent interpersonal and communication skills, including the ability to communicate complex scenarios in a manner that is engaging and allows for the client to get it
- Specialist qualifications in SMSF's would be an advantage
- Previous experience with XPLAN financial planning software preferred but not essential

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To make confidential enquiries call Tony Bedworth on **(08) 8765 7777**

Submit cover letter and resume to naracoorte@murraynankivell.com.au