

### Certified Financial Planner®

Core Wealth Advisory Services (Pty) Ltd, a boutique wealth advisory practice based in the northern suburbs of Cape Town, is seeking a **Certified Financial Planner® Professional** to grow their financial planning business and provide holistic financial planning solutions for their clients.

### Key Responsibilities

- Establishing and maintaining strong relationships with your clients.
- Bringing in new clients to our business.
- Working with an established team of associate advisors and administration specialists.

### Qualifications and Requirements

- Certified Financial Planner® as a minimum designation.
- Own existing book of clients, with a minimum of R50 million Assets Under Management.
- Minimum of 5 years' experience, in an advisory role, as a Certified Financial Planner®.
- Experience in investments and risk business is vital.
- Your experience in working as a 'fee-based financial planner' will be advantageous.

### What does Core Wealth Advisory Services (Pty) Ltd offer

- A professional office set up with **boardrooms** in Durbanville.
- A **mentoring and support team** to guide you.
- A **full suite of product providers** (codes set up for you).
- Full **administration support** (allows you to spend your time advising clients).
- An in-house, **Discretionary Fund Management service** - Core Wealth Managers (Pty) Ltd, who offer you tailored model portfolios, based on your clients individual circumstances and objectives. You will have direct access to our fund managers.

If this is of interest to you, and you meet the requirements, please email your Curriculum Vitae to [info@corewealth.co.za](mailto:info@corewealth.co.za). We request that you please include confirmation of the value of your present Assets Under Management (AUM) which can be moved with you to Core Wealth.

Please note that we will only respond to successful candidates for our short list.