

VACANCY

Paraplanner

Core Wealth is a boutique wealth management firm offering discretionary investment management and fully independent financial advisory services to individuals and corporates. We are currently offering an exciting opportunity for a dedicated Paraplanner to join one of our dynamic, value-driven advisory divisions. This role is ideal for someone who is passionate about paraplanning and finds fulfilment in excellence, precision, and providing high-level support to a team of Certified Financial Planners®.

KEY RESPONSIBILITIES

The successful candidate will support a team of financial planners by managing the full paraplanning function. Key responsibilities include:

- Capturing and maintaining accurate client data and portfolio information.
- Analysing client portfolios and running scenarios using Elite Wealth software.
- Preparing quotations, application forms, and all supporting documentation.
- Drafting clear, advisor-aligned Financial Needs Analysis reports.
- Managing client reviews, including preparing analysis and coordinating review schedules.
- Handling selected client service requests with timely follow-ups and strong administrative support.
- Updating and maintaining client records while developing expert-level proficiency in Elite Wealth.
- Growing technical expertise through continuous learning and mentorship from Certified Financial Planners®.

MINIMUM REQUIREMENTS

- 5+ years' experience in the financial planning profession.
- RE1 or RE5 (completed, or in progress with proof of registration).
- High levels of efficiency, structure, attention to detail, and accuracy.
- Fluent in both written and spoken English.
- Strong computer literacy and proficiency across modern software tools.
- A genuine desire to contribute to a dynamic, high-performing team of CFP® professionals.

ADVANTAGEOUS

- A BCom degree and/or CFP® designation.
- Experience using Elite Wealth software.

APPLICATION DETAILS

Please submit your CV, academic transcripts, a brief motivation letter, and at least three (3) contactable references to vacancies@corewealth.co.za with the subject line: Paraplanner-[Your Name]. **Closing Date for Applications: 19 December 2025**

Core Wealth is an equal opportunity employer. We thank all applicants for their interest; however, only shortlisted candidates will be contacted.

