

Role Brief

Role	Financial Adviser
Location	Dubai (not in DIFC)
Start date	ASAP
Existing clients	Your own clients with a minimum \$7m AUM

1. Summary

We are looking for an experienced financial adviser, with a positive attitude and an eye for detail. We are an award-winning boutique, high-growth financial planning firm, based in Dubai. We specialise in the delivery of fee-based financial planning and investment management for expats. We have an excellent reputation, a strong brand, high-quality marketing collateral and a fantastic support team to help you look after your clients.

2. Purpose of the Adviser role

To provide financial planning guidance to your clients so they can identify what counts for them, and to implement investment management solutions that help them move towards their financial goals, while providing the highest levels of ongoing service.

3. Responsibilities (what's involved?)

You will be responsible for all aspects of the role of financial adviser, which may include some or all of the following: -

Proposition Delivery

For new and existing clients, proposition delivery includes the following activities: -

1. Business development: Setting up initial meetings/calls/screen share – being the first contact for new enquiries, recording critical information while following the firms' standard operating procedures, and organising your schedule.
2. Preparation and distribution of client documentation including terms and conditions etc...
3. Client meetings: Either online or in person, to discuss the client's issues and to help them develop their financial plan and to recommend suitable savings and investment management solutions.
4. Record all relevant information and produce a report for the client, using our high-quality templates.
5. Working with the support team to provide a high level of ongoing client care, reviewing your client's circumstances annually and helping them with their finance-related challenges throughout the year.

Learning and Development (L&D)

We will help you to maintain a high level of professional development, so your clients benefit from your up to date knowledge. If you wish to pursue further professional qualifications, support will be provided and you won't be alone, so help will often be at hand from individuals either studying for the same qualifications, or from those that already have them.

4. Required skills

To succeed in this role, applicants will need the following skills and attributes: -

- High quality people skills. Able to start conversations in a room full of strangers, comfortable presenting, professional and engaging.
- Professional sales skills. Comfortable working with a prospect, to help them understand their own challenges, our proposition and how we can help. Not worried about discussing fees and value for money.
- Ability to gather and record data accurately, analyse product and portfolio information and draw conclusions to develop recommendations.
- Ability to effectively use a variety of software (i.e. MS Office; Outlook, Word, Excel, PowerPoint in particular and able to learn new software related to financial planning and investment management.
- Tactful, trustworthy, diplomatic and able to maintain confidentiality at all times;
- Comfortable working on own initiative, setting and managing personal goals, directing workflow and managing often conflicting deadlines.

5. Required experience

This role requires a minimum of 3 years' experience working as a financial adviser in the UAE. It won't suit an individual with aspirations to move to the region, or someone working locally and looking to move into an advisory role.

6. Required Knowledge

The successful candidate will be qualified to UK equivalent Level 4 and be able to demonstrate a keen interest in personal financial planning and investment management.

7. What next?

Our recruitment process is as follows: -

1. Submit your CV and a covering email to con.lillis@abacus.ae explaining why you feel you are a good fit for this role.
2. Suitable candidates will be invited to an initial online meeting.
3. A second in-person meeting will include an in-depth interview, a discussion about your clients, their needs and how we can help them and a chance to meet members of our team.
4. The successful candidate will then receive a formal offer.

End