

Roles and Responsibilities:

Role details : Paraplanners provide support to financial advisers and their clients by compiling research, compliance checking, writing suitability reports and answering technical queries.

A paraplanner will work closely with Financial Advisors and help them in analysing client situations and create various deliverables for clients. As such you will be required to speak with Advisers and product providers to determine any flaws and suggest suitable recommendations. We are looking for someone with strong communication skills and a problem-solving mindset.

Role Dimensions:

- Providing support to Financial Advisors for collecting data from clients, creating financial plans, implementing recommendations, preparing investment plans, analyzing various scenarios and preparing other deliverables for clients
- Liaising with product providers and other relevant third parties
- Ensuring that all regulatory and compliance standards are met
- Ensuring that all client requirements are followed through to the appropriate conclusion
- Managing, recording and monitoring Client annual reviews on behalf of the Financial Advisors

- Assisting the Financial Advisors with client presentations and any other activities as agreed

- The role holder may, from time to time, be required to undertake reasonable additional or other duties as are necessary to meet the needs of the business.

Salary Bi-furcation:

For trainee period of first 3 months the stipend will be 10k per month

CTC post evaluation: 2LPA -3LPA

Joining Period : Immediate

joining Location: Hyderabad

Interview Location: Virtual Interview

Bond : None

Designation : Paraplanner/Financial Planner

Last date to Apply : 29th May 2023

Event Date: 31st May /1st June 2023 onwards

Note : Candidates who are interested should only apply.

*****Criteria*****

10th and 12th (%) : NA
College (%) : NA
Batch : 2021/2022/2023 is fine as long as candidates are okay with the training period and package.
Bond Period : NA
Communication skills : Required
Backlogs : None
Gender : BOTH
Target Degree and Branch : MBA

(Finance), BBA, B.Com Or Any graduate

*****Process*****

1. Online application through CoCubes.
2. Candidates will shortlisted on the basis of details filled/CV.
3. Shortlisted candidates will undergo below selection rounds.
4. 1st round - Screening by HR, 2nd round - Video interview with HR/MD, 3rd round - Video interview with Regional Manager(Client

Company Profile:

Mission / Vision - Empower the youth to contribute to the socio-economic and sustainable development of the country.

Our aim is to provide services and to act as financial advisors, management consultants, direct, indirect and allied consultants to companies, firms or persons either by themselves or in partnership with others. We aim of attaining the highest levels of qualifications for both financial planners and Para planners. Build a strong technical team of Para planners who not only support the financial planners but also client services and other key client-facing teams within the organization. Together with building up technical expertise which are required for operating financial management successfully.

Official Website : <http://www.prosporaisersfinserv.com>

LinkedIn link : <https://www.linkedin.com/company/prosporaisersfinserv/>