

Financial Planner - UAE

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Company: Skybound

Location: United Arab Emirates

Category: healthcare-practitioners-and-technical

As a leading organisation in our sector with offices based across the globe, Skybound Wealth Management have developed a unique advice proposition which has led to a significant increase in client demand. We have been established in the UAE for over 10 years and advise clients across the Middle East from our offices in Dubai and Abu Dhabi.

Advice in this team will primarily focus on lump sum investing and portfolio management, retirement planning, regular savings and insurance. The successful candidates will be working closely with their respective marketing, business development and paraplanning teams who will assist them with the generation of day to day client meetings, alongside the overall growth of their client books.

Skybound will provide full support through the CII/CISI/LIBF examination process to complete the UK Level 4 Diploma and progress towards Chartered status.

Desired Skills and Experience:

A proven track record of success within an Advisory / Relationship Management capacity, within a financial services organisation such as a bank, brokerage or IFA.

UK Level 4 Diploma (or equivalent if not UK based) minimum qualification. Ideally Chartered.

A pro-active and entrepreneurial attitude that has led the generation of new business, whilst effectively maintaining client relationships in an efficient, holistic fashion.

You will benefit from:

An ongoing retainer salary package as well as self-employed options

Revenue share of new and ongoing business

Employment visa costs covered by Skybound

Medical insurance paid for by Skybound via group medical cover

Skybound Wealth Support:

Dedicated business development support

Administration support provided in-house

Industry exam costs covered by Skybound e.g. CISI, CII, LIBF

Company incentives for top performers

Licensing - both IA and SCA licenses in the UAE. Global licensing and terms of business.

Investment Team – Head of Investment Research and Investment Committee providing model portfolios, ad hoc support, weekly & quarterly market updates and ability to co-attend client meetings.

Investment Portal – online web page for clients to view up to date valuations across all providers.

Pension Service – factsheets, TVAS reports, LOA submission and ad hoc support with pension queries. Additional co-attending client meetings/calls for a fee split with an AF7 Pension Specialist.

Marketing – a dedicated marketing team running online advertising campaigns and social media accounts, with the business development team receiving inbound enquiries.

Customised new brochures for each Financial Planner.

Research Unit – specific research team identifying profiles and contact information for thousands of prospective clients.

Operations & Compliance – central UK team on-hand to answer ad hoc queries.

Cross References and Citations:

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