

2 January 2024

## **JOB VACANCY: FINANCIAL ADVISOR IN TRUST STRUCTURING**

### COMPANY DETAILS:

Company:	Prosperity Enterprises Investments (Pty) Ltd
Industry:	Real Estate Investment, Structuring & Education
Contact Person:	Malise Britz
Designation:	Human Resources Manager
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### BASIC INFORMATION:

Job Title:	Financial Advisor
Location:	Fourways, Johannesburg, South Africa
Availability:	1 February 2024
Starting Remuneration:	Competitive Salary with Performance-Based Incentives

### SUMMARY:

Are you passionate about sales and building lasting relationships with customers? Do you thrive in a dynamic and goal-oriented environment? If so, we have the perfect opportunity for you!

### REQUIREMENTS:

- Bachelor's Degree
  - Advanced Diploma in Estate and Trust Administration OR
  - Postgraduate Diploma in Financial Planning
- Proven Experience in Sales or a Related Field.
- Excellent Communication and Interpersonal Skills.
- Strong Negotiation and Closing Abilities.
- Goal-Oriented with a Track Record of Meeting or Exceeding Targets.
- Familiarity with Trust Administration and Estate Planning is a Plus.
- Ability to Adapt to a Dynamic and Fast-Paced Environment.

## ROLES & RESPONSIBILITIES

### **1. Prospecting and Lead Generation:**

- Identify and research potential clients.
- Generate leads through various channels, such as cold calling, networking, and online research.

### **2. Client Engagement:**

- Build and maintain relationships with existing and potential clients.
- Understand client needs and requirements.

### **3. Product Knowledge:**

- Stay informed about the company's products or services.
- Clearly communicate the features and benefits of the products to clients.

### **4. Sales Presentations**

- Develop and deliver compelling sales presentations.
- Tailor presentations to address the specific needs of each client.

### **5. Quoting and Pricing:**

- Provide accurate and timely price quotes to clients.
- Negotiate terms and conditions to close sales.

### **6. Closing Deals:**

- Work towards meeting or exceeding sales targets.
- Use effective sales techniques to persuade clients to make a purchase.

### **7. Market Intelligence**

- Stay informed about industry trends, competitors, and market conditions.
- Provide feedback to the company on client needs and market trends.

### **8. Documentation and Reporting:**

- Keep detailed records of customer interactions, sales activities, and transactions.
- Generate regular reports on sales performance.

### **9. Client Service:**

- Address client inquiries and concerns promptly.
- Ensure a high level of client satisfaction to encourage repeat business and referrals.

### **10. Collaboration:**

- Work closely with other departments to ensure a unified approach.
- Collaborate with team members to share best practices and strategies.

### **11. Continuous Learning:**

- Stay updated on industry developments and sales techniques.
- Continuously improve sales skills and knowledge.

**12. Adaptability:**

- Adapt to changes in the market and adjust sales strategies accordingly.
- Be flexible and open to trying new approaches.

**CHARACTER TRAITS:**

- Attention to Detail
- Excellent Work Ethic
- Unquestionable Ethics
- Internally Driven
- Sharp & Thinking on their Feet

**REASONS TO JOIN THE COMPANY:**

- Great Growth Opportunities
- Broad Exposure
- Innovative & Flexible Environment

Please click on the link to submit your Google Form Application: <https://forms.gle/4sfog4SgYRArq5LW6>.

Please take note that your application will only be considered if you have submitted this Google Form via this link. If you are experiencing difficulties with this form, please send an email to [hr@prosperityenterprises.co.za](mailto:hr@prosperityenterprises.co.za).