

## FINANCIAL PLANNING CONSULTANT

Applications are invited for the position of Financial Planning Consultant at International Financial Planning Limited. The successful applicant for the position will have a broad understanding of all areas of international financial planning and investment advice, as well as substantial expertise in the areas of individual mutual funds / multi funds, specialist savings and investment plans, offshore investments, and retirement planning. The job holder should have a proven track record in the placement of business of this nature, and the ability to work independently. The compensation structure for the position will be determined by commissions earned from the placement of international investment products.

Responsibilities and other related functions for the position will include:-

- Independently servicing and managing the individual financial planning needs of a large portfolio of local clients.
- The development of strategies and identification of offshore investment products for potential, existing, and target clients.
- Expansion of the local business operation through active business development.
- Use & development of analytical tools to support the business.

The position of Financial Planning Consultant requires the job holder to have the following qualifications, skills & experience:-

- Minimum of 8 years experience as a qualified financial planner and investment adviser.
- Holder of Chartered Insurance Institute Financial Planning Certificates, or equivalent, in respect of financial services and their regulation as required by local regulators and international offshore investments institutions.
- Proven track record of independently servicing all aspects of the financial planning and investment advice needs of local clients.
- Thorough working knowledge and understanding of investment products offered by international offshore investment institutions.
- Successful experience and a proven track record of recruiting and managing a team of financial planning consultants

International Financial Planning Limited invites suitably qualified applicants to submit written applications with a detailed resume and references to:-

Attention of Laura Jackson  
International Financial Planning Ltd  
77 Front Street, Hamilton.  
Email: [laurajackson@bes.bm](mailto:laurajackson@bes.bm)  
Telephone: 296 5627

Applications should be submitted in writing by no later than March 11, 2011.

**Bermuda Executive Services Limited**

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