Wealth Consultant

Location: Jersey

The Role

The role of the Wealth Consultant is to develop, maintain business streams and inform clients on financial strategies and plans appropriate to their needs and objectives.

Key Responsibilities

- Developing and maintaining client relationships to help maintain business flow and meet agreed targets.
- Developing and maintaining internal relationships to help maintain business flow and meet agreed targets.
- Promoting the profile of the business within the profession and wider communities
- Providing financial information and advice to clients, appropriate to their individual needs.
- Continuous professional development to meet regulatory requirements and personal development needs, subject to a mandatory minimum of 35 hours per annum.
- Ensuring that any business conducted is done in a responsible and compliant manner, meeting all legislative requirements, both internally and externally.
- Must hold a relevant qualification at Level 4 or higher as per JFSC requirements.

Key responsibilities

- The development and acquisition of new financial advice business to ensure that business targets are met.
- Some technical aspects of preparing for client meetings, including financial recommendations and client presentations.
- Running and managing client meetings.
- Preparation of meeting notes and fact-finding documentation in support of CRM's role
- Ensuring that all client requirements are followed through to the appropriate conclusion.
- Managing an ongoing review service appropriate to the client's needs in line with the business's proposition offering.
- Individual workflow and task delivery.
- The role holder will keep up to date with legislative and industry changes which affect the business, its clients and the role of the Wealth Consultant within the business.
- The role holder may from time to time be required to undertake reasonable additional or other duties as is necessary to meet the needs of the business.
- The role holder will frequently be required to travel for client visits. This may involve working outside office hours.

Why Join Us?

At Titan Wealth, we believe in empowering our people to make a difference. You'll be part of a close-knit, high-performing team that values integrity, collaboration and strategic thinking. We offer:

- International exposure across key financial jurisdictions.
- Opportunities for career progression and professional development.
- A culture of openness, challenge and continuous improvement.
- The chance to shape the future of risk management in a growing Group.