

Job Description

Position	Financial Adviser
Department	Field
Reports to	Area Manager
Location	Home Based

Summary of Role

The Financial Adviser will achieve regular sales of new business with existing and new customers in order to meet the customer's financial goals and achieve the Company's sales objectives, whilst providing an ongoing quality service to our customers.

Key Responsibilities & Duties

- Achievement of agreed sales and operating objectives
- Carry out regular reviews with your customers
- Expand existing customer base through referrals and other agreed direct sales strategies
- Contribute at regular team meetings with the Area Manager and Financial Advisers
- Complete sales documentation using in-house computer systems
- Act in accordance with the company's Code of Conduct for Financial Advisers of Forester Life*

Knowledge, Skills & Experience

- Able to build and maintain strong customer relationships
- Professional approach
- Drive and determination to succeed
- Resilient and positive attitude
- Strong communication skills
- Working knowledge of computer systems
- Sales background, previous experience in financial services would be advantageous, but not essential

Individual Conduct Rules

This position falls under the FCA's Certification Regime and, as such, the following Individual Conduct Rules apply when undertaking the duties of this position:

1. You must act with integrity
2. You must act with due skill, care and diligence
3. You must be open and cooperative with the FCA and other regulators
4. You must pay due regard to the interests of customers and treat them fairly
5. You must observe proper standards of market conduct

* The job holder is required to follow and act in accordance with the rules and requirements of the Financial Services and Markets Act 2000 and the Financial Services Act 2012 (and any other applicable legislation and amendment).