

Job Description

Position	Financial Adviser
Department	Field Sales
Reports to	Area Manager
Location	Home Based-Required to drive

Summary of Role

The Financial Adviser will achieve regular sales of new business with existing and new customers by offering the choice of both physical and digital appointments. The Financial Adviser is required to achieve the Company's sales objectives, by meeting customers' financial goals and providing an ongoing quality service to customers within their community.

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 direct sales strategies
- Contribute at regular team meetings with the Area Manager
- 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 both in person and digitally.
- Professional approach
- Drive and determination to succeed
- Resilient and positive attitude
- Strong communication skills
- Working knowledge of computer systems and Microsoft applications
- Sales background, previous experience in financial services would be advantageous, but not essential

Individual Conduct Rules

This position falls within the scope of the FCA's Certification Regime and, as such, the following Individual Conduct Rules apply:

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).