



Designation: PP2101 - Report Writer
Category: Retail Operations
Posted by: Alexander Forbes
Posted on: 19 Aug 2026
Closing date: 28 Aug 2026
Location: Johannesburg

Purpose of the Job:

Overview:

Purpose of the role

Identify client's financial planning needs and provide recommendations. To generate compliant and accurate new business and review reports for Financial Advisers

Key performance areas:

- Compilation of New Business Report
- Preparation of Risk Profile Questionnaire and Results
- Verify recommendation – FAIS, FPC house-views, approved products and portfolios only
- Advise FAA on documentation to be included in the New Business Pack
- Liaise with Adviser and FAA for monthly planning of reviews and scheduling of meetings.
- Compilation of Standard reports
- Review last minutes of meeting and update Report.
- Pulling all reports pertaining to reviews CRM & Interface
- Pull monthly review list and discuss with advisor and FAA.
- Advise FAA documentation to be included in report.
- Preparation of Regulation 28 calculation for any proposed switches
- Update CRM for record purposes and Retail Annual Review status.
- Management of monthly Reviews for example backlogs etc
- Check all review reports and action items from minutes (not relevant to FAA)
- Decision making: Must be able to come to a conclusion or decision, whether it be to further an investigation or for purposes of recommendation /
- escalation to Manager or Consultant and Co-operation & teamwork

Minimum Requirements:

- Grade 12
- Degree / NQF level 6 /RE5 CFP or studying towards
- 3 to 5 Years' Experience in the Individual Financial
- Planning Environment

KEY PERFORMANCE AREAS

Matric

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Planning Environment

The company's approved employment equity plans and targets will be considered as part of the recruitment process. As an equal opportunities employer, we actively encourage and welcome people with disabilities.