

Designation:	Client Services Consultant (LISP) Waterfall, Johannesburg, Gauteng Permanent
Category:	Administration and Operations
Job Level:	Skilled technical and academically qualified workers, junior management, supervisors, foremen and superintendents
Posted by:	PSG Financial Services
Posted on:	31 Aug 2026
Reference Number:	POS02676
Closing date:	25-Sept-2026
Position Type:	Permanent
Location:	Waterfall Magwa Crescent

Overview:**VACANCY | CLIENT SERVICES CONSULTANT (LISP) | WATERFALL, JOHANNESBURG | PERMANENT**

PSGs commitment to transform and embrace diversity is what drives us to achieve a diverse workplace with employment equity as a key goal to create an inclusive workforce. In achieving our employment equity goals, we give preference to applicants from designated groups, and we encourage people with disability to apply.

Description:

Deliver an exceptional level of service experience to all direct clients, financial advisers and internal stakeholders, of the integrated PSG Wealth investment platform. This position will report to a Team Leader.

Responsibilities:

- To service all PSG Wealth clients, potential clients and financial advisers with all instructions and queries (including outstanding requirements) for all PSG Wealth products telephonically and via written correspondence within the service levels goals
- Assist and follow-up with clients/advisers of instructions in progress - take ownership of the conclusion of an instruction for processing by administrators into the administration system, including the quality and completeness of the appropriate documents
- Assist client and advisers with queries on instructions, processes, procedures, quotes, systems (web), and facts about all PSG Wealth products and fund performance
- Resolving internal and external queries from financial advisers and clients
- Proactively retain and attract business by providing excellent service to advisers and clients
- Support a positive and responsive climate for client enquiry resolution
- Build and establish relationships at all levels with internal departments to enhance organisational effectiveness and efficiency
- Ensure accurate record keeping through service-related administrative tasks
- Assist with database updates and information maintenance
- Actively participate in the organisation's continuous improvement by identifying and proposing solutions to system, process and service-related failures
- Minimise operational errors and losses
- Apply TCF principles in daily tasks

Minimum requirements:

- Financial/Business degree (NQF Level 7)
- Relevant experience within the Financial Services industry (Investments/Wealth)
- Minimum of 2 years' experience as a consultant in a Life/LISP Call Centre/Client Services environment
- Professional and friendly telephone manner
- Knowledge and interest in finance and investment management

Skills/ Competencies:

- Business writing and speaking skills in English
- Strong verbal and written communication skills
- Numeric ability
- Client focused, friendly and empathetic manner
- Accuracy and attention to detail
- Analytical thinking
- Administration skills
- Adaptability

How to apply:

Candidates interested must apply on the PSG Careers website <https://www.psg.co.za> OR browse vacancies <https://bit.ly/3bD2iAk> by no later than 25 September 2026. By submitting your application, you are giving PSG Financial Services implicit consent to the storage and processing of your personal information. If you are not contacted within 2 weeks of your application, please accept that your application was unsuccessful.
