MOREBO

## Advisor Value Proposition:

We are seeking entrepreneurial, dynamic individuals to join the fast paced, rewarding industry of financial planning and wealth creation. We offer full training and accreditation and the opportunity to build your own practice.

Morebo was born out of a desire to address and remedy the lack of financial literacy that exists within South Africa today.

The name Morebo, literally means rhythm where colour, race and religion are of no importance. In other words, anyone can dance to the beat as long as it resonates with them. Morebo transcends all barriers and stereotypes.

The company was created to cater for the diverse and unique financial needs of each of our clients. Our approach is a holistic one where our role is that of educator, protector and caretaker of our clients' financial security.

Morebo's business philosophy is "Live to Leave a Legacy" and this is applied not only to our clients but to the transformation of the Financial Services Industry as a whole. In order to reach ordinary South Africans, the Financial Services sector is in dire need of realignment and transformation. It is Morebo's goal to make financial freedom a reality for all South Africans.

Morebo came into existence after years of careful observation of and curiosity about the financial world, South African society and our culture. The company was formed to actively participate in the transformation of the Financial Services industry. In working toward this goal, Morebo is a majority black owned Financial Advisory and Employee Benefits Firm.

**Purpose:**
To pursue the passion, we have at Liberty to make a difference in people's lives by helping them to orchestrate their financial freedom. Provide professional advice and solutions for clients. Help clients to be protected for life's unexpected events, reach their individual financial goals, plan for retirement and create wealth. Manage and grow your portfolio of clients continually and build long term relationships.

**Comprehensive training:**
World class induction of 4 weeks upon joining Liberty followed by Regulatory exams, NQF5 Wealth Planning and the opportunity to obtain the highest qualification in the industry by becoming a Certified Financial Planner (CFP). Ongoing learning and a structured mentoring process. Specialist product partners to assist with financial planning in all categories. We are an organisation that understands the value of knowledge and its power to change realities, when set into action. Knowledge is our currency and our wealth. It's our future as well as our past. It is where we come from and what we stand for. Elite Wealth system training and Induction course (PCT. – Pre-Contract Training).

To sell Liberty products in a professional manner enabling Agency in achieving its strategic vision & therefore meeting targets profitably. To prospect for clients/ to obtain leads to secure appointments - daily activity. To conduct a professional FNA to make needs-based recommendation that could lead to a sale

**Location**

Libradge – Braamfontein, Johannesburg

**Candidate requirements:**

- A minimum matric/ grade 12 qualification or equivalent as defined by SAQA.
- Relevant Degree or Diploma (preferably Commerce or Law) - Advantage
- Must be a SA citizen or Permanent Resident, must have a valid 13-digit ID number.
- Valid SA drivers licence
- Reliable motor vehicle
- SA income tax number
- No criminal record / No credit listings/No debt review/Judgements or sequestration
- Laptop (according to the Liberty specification).

**Technical / Legal Certification** (Depending on the date of appointment in the industry)

- RE1 / RE 5
- FAIS Fit & Proper (120 credits) or full qualification recognised by the FSB If the individual has 5 years' experience in the industry - as per DOFA date, then the relevant NQF 5 qualification applies
- If the individual has 2 years' experience in the industry - as per the DOFA date, the RE qualification applies.

- Ability to use your own network and circles of influence to obtain referrals and book numerous daily appointments with clients
- Mature, presentable, articulate and professional
- Good experience in and a passion for working with clients
- Self-motivated and driven to reach targets
- Good learning ability
- Ability to work autonomously and without tight supervision

**Skills**

- Computer Literate
- Communication
- People
- Analytical
- Attention to detail
- Presentation
- Organisational
- Disciplined
- Listening
- Adaptability
- Customer Centricity

**Attributes**

- Confidence
- Assertiveness
- Resilience
- People Centric
- Professional
- Drive
- Autonomy
- Flexibility

**Reward:**

- Performance awards and rewards
- Education/ further studies industry related
- Mentorship

**Support:**

- Administration (appointment setting, process support, Astute information gathering, client packs)
- Tele Sales
- Access to financial planning platform through the Elite Wealth tool
- Internet Access
- Telephone, a landline will be provided
- Desk & chair
- Compliance support
- IT Support, there is a dedicated help desk
- MS Office a comprehensive offering covering the four core applications. Microsoft Outlook, Excel, Word, PowerPoint

**If you qualify in terms of our requirements and you are looking for personal growth in this industry, please email your CV to wvanwyk@morebo.co.za**

**Website: http:// www.morebo.co.za**