

Financial Advisor Career Path



Irish Pensions & Finance

1 Quarter 1

- Training:**
- Inbound / Outbound Sales Techniques
 - Introduction to Public Sector Pensions
 - Diary Management / Software training
 - AVC's overview
 - Financial Factfinds principles
 - Our Market

KPIs

2 Quarter 2

- Training:**
- Compliance
 - Principles of Marketing
 - Business Relationship Management
 - Principles of Quality Control & Administration
 - Field Training

KPIs & Monetary Target

3 Quarter 3

- Training:**
- Advanced Consultative Sales Techniques
 - One to One Consultation Training
 - Prospecting & Area Development
 - Building a business book
 - Field Training
 - Timeplanning

KPIs & Monetary Target

4 Quarter 4

- Training:**
- Business Development
 - Accompanied Consultations & Field Training
 - Group Meeting Training
 - Advanced Product Training
 - Advanced Closing

KPIs & Monetary Target

5 FINANCIAL ADVISOR

- Training:**
- Advanced Business Relationships
 - Advanced Business Development
 - Advanced Marketing Techniques
 - Mentoring / Field Training colleagues

KPIs & Monetary Target

6 FINANCIAL ADVISOR

- Training:**
- Advanced Quality Control
 - Product Specialisation

KPIs & Monetary Target

SENIOR FINANCIAL ADVISOR

Once you qualify through our 6 step programme, you will progress to the position of **Senior Financial Advisor**.

In-House Trainee Financial Advisor (Year One)

APA qualified:

O.T.E €42,000

QFA qualified:

O.T.E €50,000

Financial Advisor

Year Two:

O.T.E €54,000

Year Three:

O.T.E €70,000

Senior Advisor:

O.T.E €90,000+