

IBF Roadmap for Financial Planning

Management of F.A. Representatives





 **> 8 years experience**

JOB ROLES

Financial Services Directors/Managers 

COMPETENCIES



-  Team Leadership
-  Recruitment and development of FA representatives
-  Performance of FA representatives
-  Supervisory oversight


IBF
Advanced



Financial Planning – Personal




 **> 3 years experience**

JOB ROLES

Senior Financial Planners/
Senior Personal Financial Consultants 


COMPETENCIES



-  Business ownership and financial planning.
-  Investment Planning (Intermediate).
-  Estate Planning






Financial Planning – H.N.W.I


JOB ROLES

Financial Planners for High Net Worth 

COMPETENCIES



-  Needs and concerns of High Net Worth individuals.
-  Analysis and development of life insurance solutions for High Net Worth individuals
-  Succession Planning and Buy-Sell Agreements for High Net Worth Business Owners
-  Investment Planning for High Net Worth individuals
-  Construction of Recommendations for High Net Worth individuals

-  Apply knowledge of trends and developments in financial planning Solutions, financial products and laws and regulations

IBF
Qualified



 **< 3 years experience**







Financial Planning – Personal

JOB ROLES

Financial Planners/ Personal Financial Consultants 

COMPETENCIES



-  Industry knowledge on laws and regulations as well as financial products.
-  Develop a Trust-Based Relationship with Clients
-  Clients Acquisition & Acceptance
-  Cash Management, Insurance Planning, Investment Planning, Retirement Planning
-  Construction of Personal Financial Plan
-  Review of Personal Financial Plan