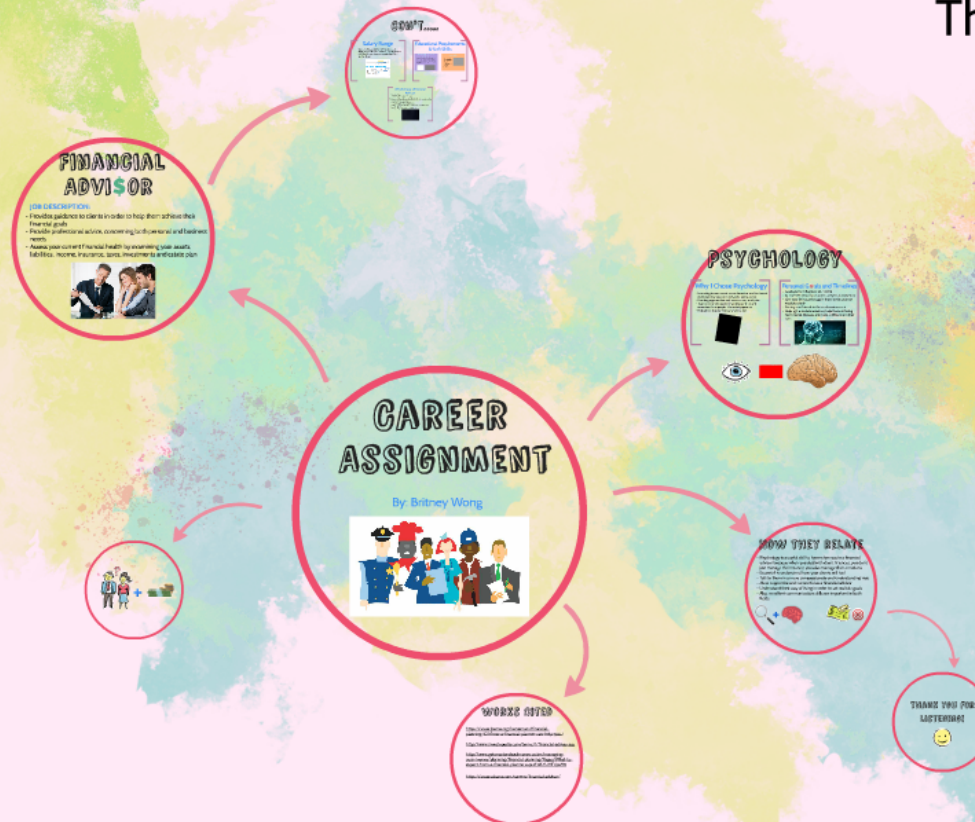


FINANCIAL HEALTH ASSIGNMENT

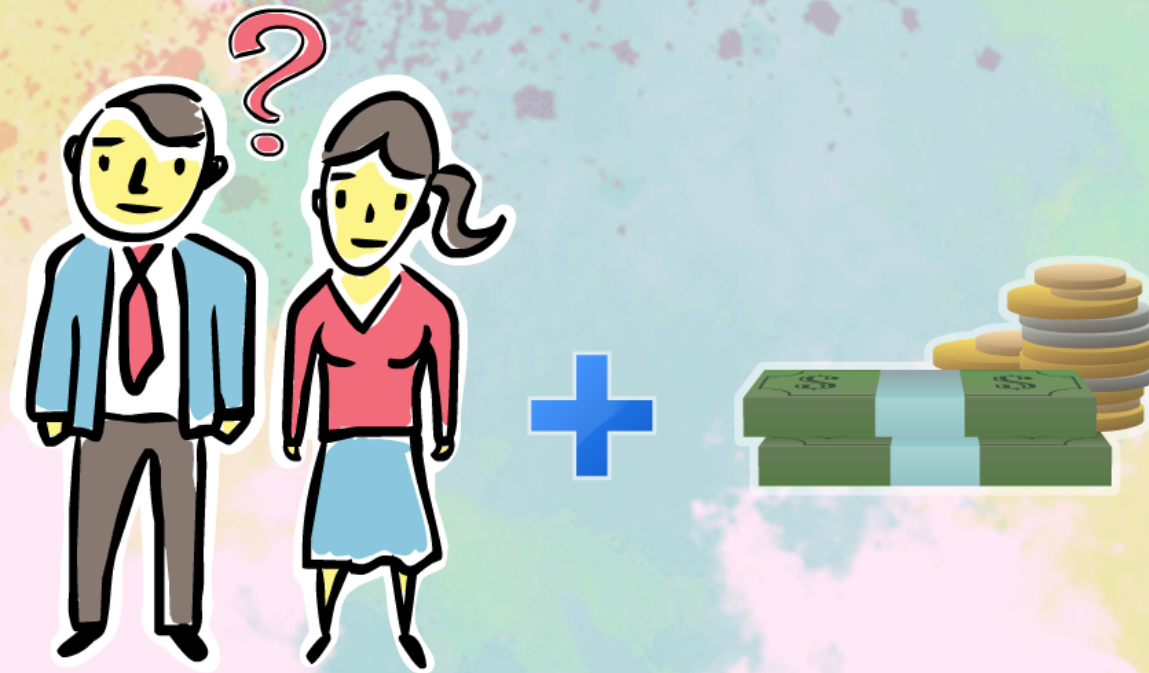


FINANCIAL HEALTH ASSIGNMENT

CAREER ASSIGNMENT

By: Britney Wong





FINANCIAL ADVI\$OR

JOB DESCRIPTION:

- Provides guidance to clients in order to help them achieve their financial goals
- Provide professional advice, concerning both personal and business needs
- Assess your current financial health by examining your assets, liabilities, income, insurance, taxes, investments and estate plan

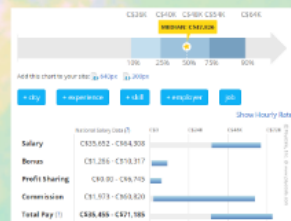




CON'T.....

Salary Range

- Earns an average salary of C\$47,826 per year
- Salary range is between \$35,455 - \$71,185 per year
- A skill in Mortgage Loans is associated with high pay for this job



Educational Requirements & Soft Skills

Educational Requirements • Qualifications

- A post-secondary diploma/degree, ideally in Commerce, Business Administration or related experience is required
- Must successfully complete Mutual Funds accreditation
- Must successfully complete the Certificate in Financial Services Advice
- Branch Compliance Officer accreditation is considered an asset



Soft Skills

- Excellent communication skills
- Organizational skills
- Time management skills
- Ability to apply financial counseling principles
- Confidence



Why I Chose a Financial Advisor

- Extremely helpful
- Occupation that everyone can relate to

Everyone needs financial advice, especially when it comes to changes such as:

- Saving enough for retirement
- Preparing for a marriage or divorce
- Caring for aging parents or a disabled child
- Coping financially with the death of a spouse or close family member
- Funding education
- Buying, selling or passing on a family business



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