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Meesho Recruitment 2023 – Jobs Near Me – Financial Planner Post

Job Location
India
Remote work possible

Base Salary
Rs. 25,000 - Rs. 50,000

Qualifications
12th, Graduate

Employment Type
Full-time

Description

Meesho Recruitment 2023

Job Description: We are currently seeking a highly skilled and knowledgeable Financial Planner to join our team at Meesho. As a Financial Planner, you will play a crucial role in helping our clients achieve their financial goals by providing comprehensive financial planning and investment advisory services. Your expertise and guidance will be instrumental in creating personalized financial strategies that align with our clients' objectives.

Responsibilities:

- Responsibilities:
    1. Conduct in-depth financial analysis, gather relevant information, and assess clients' current financial situations to develop a comprehensive understanding of their goals and objectives.
    2. Create personalized financial plans based on clients' risk tolerance, time horizons, and financial objectives, incorporating investment strategies, retirement planning, tax planning, and estate planning.
    3. Provide expert advice on investment options, asset allocation, and portfolio diversification to optimize clients' investment performance and manage risk.
    4. Collaborate with clients to develop short-term and long-term financial goals, regularly reviewing and adjusting their financial plans to accommodate changing circumstances and market

Hiring organization
Meesho

Date posted
July 3, 2023

Valid through
30.09.2023

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conditions.
5. Stay up-to-date with industry trends, economic factors, and regulatory changes that may impact clients' financial planning strategies, ensuring compliance with relevant laws and regulations.
6. Educate clients on various financial products, services, and investment options, empowering them to make informed decisions about their financial future.
7. Build and maintain strong relationships with clients, actively engaging in regular communication and providing ongoing support and guidance.
8. Leverage financial planning software and tools to create accurate projections, perform scenario analysis, and monitor clients' progress towards their financial goals.
9. Collaborate with internal teams, such as tax specialists and estate planning experts, to provide comprehensive financial solutions to clients.
10. Continuously enhance your knowledge and expertise in financial planning through professional development opportunities, certifications, and industry research.

Responsibilities:

1. Conduct in-depth financial analysis, gather relevant information, and assess clients' current financial situations to develop a comprehensive understanding of their goals and objectives.
2. Create personalized financial plans based on clients' risk tolerance, time horizons, and financial objectives, incorporating investment strategies, retirement planning, tax planning, and estate planning.
3. Provide expert advice on investment options, asset allocation, and portfolio diversification to optimize clients' investment performance and manage risk.
4. Collaborate with clients to develop short-term and long-term financial goals, regularly reviewing and adjusting their financial plans to accommodate changing circumstances and market conditions.
5. Stay up-to-date with industry trends, economic factors, and regulatory changes that may impact clients' financial planning strategies, ensuring compliance with relevant laws and regulations.

Qualifications:

- High school diploma or equivalent
- 1-2 years of experience in customer service
- Proficiency in Microsoft Office Suite
- Excellent communication skills

Skills and Qualifications:

1. Bachelor's degree in Finance, Economics, Business, or a related field. A master's degree or relevant certifications (e.g., Certified Financial Planner – CFP) are a plus.
2. Proven experience in financial planning, investment advisory, or related roles.
3. In-depth knowledge of financial planning principles, investment strategies, retirement planning, tax planning, and estate planning.
4. Strong analytical and problem-solving skills to assess clients' financial

situations and develop customized solutions.
5. Excellent communication and interpersonal skills to effectively collaborate with clients and explain complex financial concepts in a clear and concise manner.
6. Proficiency in financial planning software and tools to create comprehensive financial plans and projections.
7. Ability to build and maintain strong client relationships, demonstrating trustworthiness, empathy, and professionalism.
8. Detail-oriented with strong organizational and time management skills to handle multiple client cases and meet deadlines.
9. Ethical and trustworthy, adhering to professional standards and maintaining client confidentiality.
10. Knowledge of relevant laws, regulations, and industry best practices in financial planning.

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