

# Financial Investment Advisers & Managers

Financial investment advisers and managers develop financial plans for individuals and organisations, and invest and manage funds on their behalf.

## Job title examples

- Financial Investment Adviser / Financial Planning Adviser
- Financial Investment Manager / Portfolio Manager

## Other jobs in this field of work

## What financial investment advisers and managers do

- interview prospective clients to determine financial status and objectives, discuss financial options and develop financial plans and investment strategies
- monitor investment performance, and review and revise investment plans based on modified needs and changes in markets
- recommend and arrange insurance cover for clients
- arrange to buy and sell stocks and bonds for clients
- advise on investment strategies, sources of funds and the distribution of earnings
- set financial objectives, and develop and implement strategies for achieving the financial objectives
- manage funds raised from personal superannuation savings policies and unit trusts
- assist in meeting superannuation compliance requirements
- direct the collection of financial, accounting and investment information and the preparation of budgets, reports, forecasts and statutory returns
- may refer clients to other organisations to obtain services outlined in financial plans

## Main employing industries

- Financial and insurance services

## Qualifications



The following government subsidised qualifications are available in NSW:

**Certificate IV in Superannuation** available as a traineeship or qualification

**Diploma of Financial Planning** available as a qualification

**Course fees:** You may be eligible for government subsidised training under Smart and Skilled. Go to the [Course Finder](#) to find training in your area, estimate your fee and find a training provider.

## Job prospects and pay



- There are around 18,540 financial investment advisers and managers working in NSW.
- Over the next four years, employment in this occupation is expected to grow in NSW.

### Average weekly full time earnings (before tax):

- Financial investment advisers and managers: \$1,753
- All occupations: \$1,200

## Related jobs



- Financial broker
- Credit and loans officer
- Insurance, money market and statistical clerk

To find out more about other jobs, visit the [Job Guides Homepage](#).

### Information sources

Occupations: Australian Bureau of Statistics, Australian and New Zealand Standard Classification of Occupations, 1220.0

Employment: Australian Bureau of Statistics, Labour Force, Australia, Detailed, Quarterly, 6291.0.55.003

Skills shortages: Department of Employment, Skill Shortage List NSW 2015-16

Job prospects: Centre of Policy Studies (CoPS), Victoria University, Employment Forecast Data for NSW 2015/16 to 2022/23

Earnings: Department of Employment, joboutlook.gov.au, based on ABS Characteristics of Employment Survey, August 2014