Financial Investment Advisers and 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  
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  