

Paraplanner

Position	Paraplanner
Company	VT Outsourcing & V Trust Global
Location	Ahmedabad, India
Job Type	Full-Time
Job Category	Financial Planning

Position Overview

VT Outsourcing & V Trust Global is seeking a motivated and detail-oriented Paraplanner to join our growing team in Ahmedabad. This role involves supporting Australian financial advisers by preparing high-quality financial advice documents, conducting research, and assisting with the end-to-end advice process.

You will work closely with advisers and support teams to deliver accurate, compliant, and efficient financial planning documentation, contributing directly to the success of our Australian clients.

Key Responsibilities

- Prepare financial advice documents including Statements of Advice (SOA) and Records of Advice (ROA).
- Conduct thorough research on superannuation, investments, insurance, and financial strategies.
- Analyse client financial information to assist advisers in developing suitable and compliant recommendations.
- Ensure all documentation meets Australian compliance and regulatory standards (e.g., ASIC, Corporations Act).
- Maintain accurate client records and documentation within CRM and financial planning systems.
- Provide technical and administrative support to advisers and client service teams as required.
- Work collaboratively with the team to continuously improve processes and deliver efficient back-office support.
- Stay up to date with changes in Australian financial planning legislation, products, and industry standards.

Qualifications & Skills

- MBA or Bachelor's degree in Finance, Accounting, Economics, or a related discipline.
- Strong analytical and research skills with the ability to interpret complex financial data.
- Excellent attention to detail and organisational skills.
- Understanding of Australian financial planning concepts, products, and regulatory frameworks is preferred.
- Experience with financial planning tools such as Xplan, AdviserLogic, PlutoSoft, or Midwinter is an advantage.

- Strong written and verbal English communication skills with the ability to produce clear, professional documentation.
- Ability to manage multiple tasks and meet deadlines in a fast-paced environment.

What We Offer

- Competitive salary package commensurate with experience and qualifications.
- A collaborative and professional work environment with a highly experienced team.
- Exposure to Australian financial planning and wealth management operations.
- Ongoing training and professional development opportunities.
- Stable, full-time employment with a reputable and growing outsourcing firm.

To apply, please submit your resume and a brief cover letter outlining your relevant experience to our HR team.

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