A Day in the Life of a Financial Adviser

CLAIRE: I work between the two BankWest branches, Mandurah and Mandurah Forum.

My day generally starts at the branch greeting the staff. I go into my office and check my emails for the day. At 9 o'clock we generally have a huddle. At the huddle we discuss how the week's revenue targets etc have been and look at what we are going to focus on today.

After that, I usually have my first appointment waiting. At the appointments, which I have quite a few throughout the day - each appointment I generally get to know what the customer is looking for, get to know a bit about the customer, their needs and objectives, put some recommendations to them and that's the first appointment.

Then after, once the customer leaves. I input their details into the system, start writing up the report, get it off to Paraplanning and the day generally consists of similar actions throughout the day.