



Money Matters with Les Conway

Director/Financial Planner at Essentially Financial

Five Attributes Financial Planner's Need

My daughter, Sophie, is studying for a Masters in Sports Management and Marketing.

As part of her course, she meets up with a careers coach who is helping her to plot her path and think about her future career.

They recently undertook an exercise where Sophie was asked to think about someone she saw as a role model. She then was told to list down the personal qualities, skills and strengths and why these were important to her.

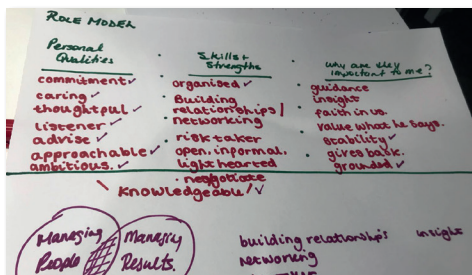
The personal qualities she listed included being approachable, a good listener and being committed yet informal and open. Skills and strengths included being organised, good at building relationships, a strong negotiator and knowledgeable.

And some of the reasons as to why Sophie felt these were important were that they gave her a sense of faith, accompanied by good guidance and stability, amongst other things.

She could well have been describing what most people want from their financial planner.

A good financial planner certainly needs to be organised and skilled at building rapport with his or her clients as this really is a long-term relationship when done correctly.

A good financial planner needs to listen more than he or



she talks and needs to be informal enough that the client feels comfortable in their presence and at ease when sharing things with them.

And of course, you'd quite rightly expect someone in a financial planning position to be very knowledgeable, provide good guidance and be a person you had complete faith in.

So, who was Sophie's role model? I'm very pleased to say it was me.

Listening to her explaining her reasons made me feel proud. Not just for being a role model to my daughter which is my most important role as a father, but also that much of what I tell people to look for in a financial planner was in Sophie's description.

Thanks for reading.

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