



Henderson Matusch  
PROVIDING FINANCIAL FREEDOM

## Stage 2: Paraplanning Roles

As a Paraplanner you will learn technical and strategic planning skills, and learn to prepare a variety of advice documents, as well as, how to complete financial modelling using a variety of tools. In addition, you will be involved with ensuring that we meet our required compliance obligations, and work closely with Advisers to provide great outcomes for clients.

During your 12 – 24 months in this role, we will support you to gain the qualifications and experience needed, and after a period you may also have the opportunity to begin sitting in on client appointments with an Adviser, and assisting in developing strategies for these clients.

