Financial planning involves interviewing a customer to discover not only their financial goals but also whether these are achievable given the estimated level of income and other factors or constraints such as debts owing, dependents to provide for, health, age, and tolerance to investment risks.

Asset management is the professional management of assets or investments for a wide range of clients including government agencies, pension funds and companies and collective or pooled schemes such as investment trusts, ISAs and mutual funds.

Retail Banking: More commonly known as high street banks, retail banks provide banking services, loan facilities and financial advice to businesses and members of the public through large branch networks. Jobs in retail banks are predominately customer-facing, such as working as a cashier, financial advisor, small business or branch manager.

Corporate banking: Corporate banking provides financial services tailored to meet the needs of larger companies. Commercial banking requirements can be quite different when compared with small businesses, as the volume, size and complexity of transactions are significant and therefore potentially riskier.

Insurance brokers analyse clients' needs and negotiate the best deal with insurance companies. This could be for individuals or for businesses. Within the insurance industry there are lots of opportunities. These range from highly specialised, analytical roles to general business management.

Retail & Corporate Banking

Asset Management

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