Appendix 1: Semi-structured interview questions

# Current work

Who do you currently work for?

What are your employment arrangements?

What do you think makes a good financial advisor/planner?

# Career pathways

Can you explain your career path to becoming a financial advisor/planner?

What are the essential factors that have helped you in your career?

What are some of the obstacles you have encountered in your career?

# Drivers

What were your initial reasons for becoming a financial advisor/planner?

Why do you think other women and men would be interested in a career as a financial advisor/planner?

What are your key motivations for your career in financial planning/advising?

What aspects of a financial advisor/planner job/career work well for you?

# Barriers

Based on your experience, did you experience any barriers when entering the profession? Based on your experience, do you experience any barriers for progressing in the profession?

Thinking about your career path, what barriers have you experienced?

# Opportunities

Given the current context of financial planning/advice, do see opportunities for women and men in financial planning?

Can you explain anything that helps women and men be successful in financial planning?

Is there something that you think would help more women to be successful in financial planning?

# Any other

Is there anything else you think we should know regarding our research topic?

Appendix 2: Coding structure

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| --- | --- | --- |
| **Major Theme** | **Definition** | **Sub themes** |
| 0. Valence | Association of terms as positive/negative. | * Positive * Negative |
| 1. Work place culture/practices | Reference to any work place activities, practices and ideologies at the work place | * Sales Target Culture * Boys Club * Work arrangements * Workplace culture * Salary and Remuneration * Family- Work Balance |
| 2. Skills/Personal characteristics/dispositions of FAPs | Reference to personal characteristics required to be successful (e.g. confidence, life experience, technical skills, empathy etc.) This includes stereotyped skills for men and women | * Confidence * Desire to help * Experience (age) * Interpersonal ‘people’ soft skills * Appetite for Risk/adventure * Honesty/integrity * Independence/ Autonomy * Organised * Sales Focus * Women Specific Skills * Men Specific Skills * Types of Financial Planners |
| 3. Networking and mentoring | Reference to the need to build social networks and mentors to build careers | * Mentoring * Conferences * Networking for clients * Networks for career building * Women’s Networking groups |
| 4a. Formal occupational requirements | Reference to education, CPD legislation regulatory needs of work | * Formal Job requirements |
| 4b. Changing environment | Mention of the changing environment of financial advice - includes how compliance makes the career unattractive | * Compliance |
| 5. Career pathways | Reference to career development in financial advice | * Career development * Career breaks * Future Opportunities * Pathway from Paraplanner to Financial Planner * Recruitment Practices |
| 6. Clients | Reference to clients and their role in financial advice | * Obtain clients * Clients expectations |
| 7. Support | Reference to support provided to enable work and careers | * Support partner or home * Support from employer or employer’s dealer group * Support from peers and co-workers * Support from industry |
| 8. Gold dust | Double code any quotation that represents the essential topic of an issue | * Gold dust |
| 9. Other | Anything that doesn’t fit but seems important | * Suggestion for change * Difference between Australia and NZ |