

# Job Specification

## Client Services Administrator (FP)

### Roles & Responsibilities



Assist all members of the Financial Planning team to:

- Provide a point of contact for clients. Answer incoming calls and handle non-advice related queries.
- Provide administrative support as needed
- Liaise with investment product providers to assist and resolve client queries, collect client data and prepare required documentation and reports as required
- Complete and follow-up tasks associated with implementation of advice strategy for a client as required
- Complete and follow-up tasks associated with on-going review for a client as required
- Researching products, strategies and technical issues as required
- Accurate and timely record keeping of both client files and XPLAN



Ability to review work and understand workflow, including:

- Ability to self-review work
- Ability to prioritise & use time effectively
- Ability to meet deadlines
- Communicates delays / issues with assignment to manager in advance of deadline
- Understands and monitors budgets



Awareness and interaction, including:

- Responds positively and quickly to client's and team member's requests.
- Demonstrates excellent listening skills
- Expresses opinions clearly and logically with excellent verbal and written communication
- Ability to develop professional relationships with team members
- Willingness to help others
- Demonstrates initiative
- Demonstrates high professional standards - Is honest and trustworthy



Software skills, including:

- Proficient in using a variety of Financial Planning Software XPLAN (preferred)
- APS: Central Console (preferred)
- Demonstrates intermediate to advanced ability to use Microsoft Office Products (Word, Excel, Email)

### Qualifications



Cert III or IV in Business Admin or Financial Services (or equivalent)

### Prerequisites



1+ years financial services experience (or equivalent)



Have a comprehensive understanding of financial planning & investment concepts & principals.