

**Role:** Adviser, Financial Planning  
**Reports To:** **Responsible Manager and Client Engagement Director**  
**Based At:** Hobart, Tasmania

## About Us

We help businesses and individuals achieve financial security and prosperity and ensure they are on track to reach their goals. Small business owners, sole traders, consultants, individuals and families – we are inspired daily by the people we work with. We are thrilled to share their journey. We aim to surpass expectations, to explore, to always be better. But above all, we believe that remarkable futures are possible with the right financial guidance.

## Our Team

Our team thrive on building remarkable futures for our clients. We are the sum of our people, and we chase the extraordinary in all that we do; in our pursuits, in our work, and above all, for our clients. To make it happen, our team provides a range of services including those related to business advisory and coaching, accounting and taxation, and wealth advice and protection.

## Your Focus

Your focus is to provide remarkable service and outcomes by engaging directly with clients. You are skilled at building deep relationships with our clients by ensuring that you are adding value at all times and helping them on their journey to feeling confident of being on track to achieve their goals.

## Your Accountabilities

- ▶ Proactively engage clients by providing high value, strategic advice supported with this highest standard of technical rigour to ensure our clients are empowered to make decisions and feel confident of being on track to achieve their goals.
- ▶ You engage clients to help them define their short to long term objectives, determine issues that need to be addressed and confirm an action plan that will define the scope of advice Collins SBA is engaged to deliver.
- ▶ Lead by example and work with other members of the financial planning team to deliver remarkable financial planning services and adherence to business process.
- ▶ Lead the constructive critique of existing business processes and innovation to achieve greater efficiency and ultimately more effective outcomes for clients.
- ▶ Ensure you are on track to meet or exceed your KPIs.
- ▶ Deliver reliably on the "Lane" responsibilities that have been assigned to you.

- ❖ Consistently modelling business values, leading by example, and actively contributing to a workplace culture that is positive, productive, respectful and inclusive.
- ❖ Actively championing a 'safety first' workplace culture and ensuring that reasonable measures are taken to help ensure the health, safety and wellbeing of yourself, team members and visitors.

### Critical Success Factors

<p>Character and Behaviours</p>	<ul style="list-style-type: none"> <li>❖ You are deeply committed to the business' values and always act in accordance with them.</li> <li>❖ You are a highly respected team member who values a positive workplace culture.</li> <li>❖ You are passionate about being part of a team that is committed to service excellence.</li> <li>❖ You strive to maximise efficiency and productivity while maintaining high standards of quality.</li> <li>❖ You display high levels of initiative and sound judgement.</li> <li>❖ You actively listen, and promote open, constructive and respectful interactions.</li> <li>❖ You manage your time and priorities effectively and deliver on your promises and legislated deadlines.</li> <li>❖ You stand up for what you believe in but also recognise and appreciate differences of opinion.</li> <li>❖ You are widely trusted, admit your mistakes and are open to constructive feedback.</li> <li>❖ You are resourceful when challenged by issues or setbacks as you always find a solution on your own or by collaborating with others.</li> <li>❖ You are future orientated and know how to create a competitive advantage through ideas, strategies and communication.</li> </ul>
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Competencies	<ul style="list-style-type: none"> <li>❖ You are driven and care passionately about providing a remarkable service to our clients by ensuring clients feel confident they are on track.</li> <li>❖ You are accountable for working “on the file” to ensure that the holistic needs to the clients are met.</li> <li>❖ You have a proven ability to meet or exceed your KPIs.</li> <li>❖ You are self-sufficient and proactive when managing your workflow as well as the workflow of your team.</li> <li>❖ You can identify, analyse and resolve complex business problems in an efficient manner to create value for our clients.</li> <li>❖ You have a proven ability to nurture, develop and successfully manage a small team to deliver exceptional results.</li> <li>❖ Proven ability to deliver results in a dynamic and fast-paced environment.</li> </ul>
Essential Requirements	<ul style="list-style-type: none"> <li>❖ Bachelor of Business, Commerce or Finance</li> <li>❖ Intention to complete, completed or nearing completion of a Diploma of Financial Planning and CFP certification</li> </ul>
Desirable Requirements	<ul style="list-style-type: none"> <li>❖ Experience working for a financial planning organisation.</li> <li>❖ Leading teams to deliver remarkable results.</li> </ul>

### Your Relationships

Direct Reports	Other Key Relationships
<ul style="list-style-type: none"> <li>❖ Not applicable</li> </ul>	<ul style="list-style-type: none"> <li>❖ Advice coordinators</li> <li>❖ Associate Adviser/s</li> <li>❖ Finance Director</li> <li>❖ Client Service Coordinators</li> <li>❖ Executive team</li> </ul>