

Client Services Coordinator

Department:	Financial Planning
Location:	Hobart or other location as approved
Responsible to:	Senior Adviser
Direct Reports:	Not Applicable

Role Purpose

The purpose of this role is to actively support a Senior Adviser by providing financial planning administrative assistance which includes the ability to confidently communicate with clients. The role requires an understanding of the importance of working closely with other team members and external professionals to ensure our clients receive a seamless and holistic advice experience.

Key Responsibilities

Our team members typically have diverse backgrounds, however, the following skills and are common amongst all Client Services Coordinators:

Control Responsibilities

- Actively champion controls.
- The Collins SBA core values, processes, compliance obligations and procedures drive your actions, attitude, advice and behaviour.

General Responsibilities

- Assist with front reception duties as required.
- Responsible for advice implementation and preparation which may include (but not restricted to) investment placements, insurance amendments, super and pension adjustments.
- May attend some meetings with advisers.
- Scheduling of planning meetings.
- Ability to adapt to system improvements and always on the lookout for better ways of doing things.
- Work closely with an Adviser and follow their mentoring advice.
- Creation, administration and maintenance of client files including fee statements.
- Meet the competencies outlined in the “Professional Team Technical Competencies”.
- Able to assist others in training or skill development where appropriate.
- General office and administration duties as required.

Cultural Responsibilities

- Service standards met.
- Deep belief and adherence to the highest industry standards.

Skills and Abilities

- Collaborate with others to ensure we are critically evaluating business processes and other initiatives and be open-minded to the change that follows.
- Ability to effectively communicate complex ideas verbally and in writing.

Personal Qualities

The team member holding this role must be:

- Highly determined and motivated with a track record of success.
- Highly team focused and have a deep understanding that more can be achieved by working together.
- Adaptable to change and embracing of innovation and creativity.
- Approachable, committed, organised and resourceful.

Education

Qualifications are not required however if wanting to progress knowledge and/or career then further education will be supported and encouraged.

Confirmation

I confirm that I:

- Have read and understand this Position Description
- Will comply with the requirements and expectations.

Name: _____

Signed: _____

Date: _____