Position Description

POSITION TITLE: Intermediate Paraplanner

THE OPPORTUNITY

Our Australian client provides an exceptional level of compliant paraplanning advice to their Australian clients including Retirement Planning, Investment Advice, Tax Planning, and Estate Planning. We are looking for enthusiastic and driven individuals to experience working hand in hand with the Australian team.

ROLE DESCRIPTION:

This role will encompass calculation of net asset values on a variety of complex Funds. Using state of the art Australian Financial Planning Software such as Xplan, you will be required to generate simple to complex financial plans and mentor other Paraplanners in due diligence and best practice. You will prepare highly compliant Statements of Advice (SOA's) and work closely with your team in Australia in writing and verbally along with other team members globally.

KEY RESPONSIBILITY:

Develop financial strategies to meet client's objectives based on existing situation of clients:

- Ensure all client data and information correctly entered in XPlan (financial planning software).
- Assist client service managers in communicating with clients from the initial discussion right through to Strategy Presentation.
- Research and develop a thorough understanding of current financial situation of clients.
- Prepare comparisons between existing products and proposed products and assist advisers and client service managers in making educated decisions on how to proceed advice preparation.
- Work with the Client Service Manager and Advisers to prepare the financial strategy based on information provided and research completed.
- Prepare all required documents advice documents and application forms for advisers to present to clients including CSAs and fee forms.
- Assist with adviser calendar management.
- Work closely with compliance department to ensure all obligations are being met.
- Preparation of intermediate Cashflow, Retirement, Superannuation and Investment projections for client strategies.

Ensure that client's financial objectives are met year to year – in consultation with the Client Service Manager and Adviser:

- Review client portfolio to ensure goals and objectives are aligned with desirable outcome.
- Update all new information from last review meeting as well as any correspondence throughout the year.
- Review client's insurance needs in terms of current financial position, life stage, policy competitiveness and policy features.
- Prepare Annual Review packs for all scheduled review meetings for your pod including reporting, presentation and investment rebalance documents.

Position Description

Assist advisers in responding to client's request any time:

- Develop a thorough understanding of client's situation.
- The ability to research information required and prepare an articulate response for the adviser to communicate with the client.
- Ensure that clients are kept in the loop and communicated with regularly until the query is resolved.

Administrative Tasks

- Ensuring all documentation is saved in correct areas on the server and named appropriately.
- Completion of daily activity tracker to log your activity for the day.
- Ensuring databases are continually kept up to date.
- Self-management of allocated tasks via Xeppo to ensure clients are receiving the highest level of service.
- Work collaboratively with all Pod members and staff in all 3 locations.

SKILLS, EXPERIENCE & QUALIFICATIONS

- Bachelor's Degree in Financial related areas, i.e., Business, Commerce, Finance, Accounting
- Ability to develop a working knowledge of the Australian Superannuation, Financial Planning and Taxation System
- Willingness to learn all areas of Financial Planning processes including Superannuation, Investments, Gearing, Retirement income, Tax minimization strategies and Personal & Key Man Insurance
- Experience with Financial Planning software such as XPlan preferred but not required
- Proficiency in the Microsoft Office applications
- Comprehensive verbal and written English skills
- Driven, proactive and able to work independently

AS WHITE OFFERS

- A diverse, inclusive, and supportive company culture
- Competitive remuneration
- Opportunity to collaborate and work with global clients and stakeholders
- Medical benefits
- Great Paid Leave entitlements
- Team outings, travel opportunities, company parties/events, and other exciting activities
- Exposure to an international environment, working with people across Malaysia, Vietnam, the Philippines, and Australia
- Industry and role-related training
- Ongoing career opportunities

ABOUT AS WHITE

AS White (ASW) is an Australian company specializing in integrated offshore staffing solutions. With our Head Office in Sydney, we have contemporary offices located in Vietnam, the Philippines and Malaysia. With over 1200 employees globally, ASW supports businesses to build high-performing remote staffing solutions that are tailored specifically to meet their goals.