



Position Description

POSITION TITLE:

Financial Planning Administrator

THE OPPORTUNITY

Our client is a financial firm with over 30 years' experience working with SMEs and high net wealth individuals ranging from start-up founders through to established businesses. You will be an integral part of an Australian Financial Review (AFR) Top 50 Accounting Firm. Our client is growing, and they are looking for equally passionate people who want to grow with them.

ROLE DESCRIPTION:

This role focuses on providing ongoing support to the Financial Planners, in matters of advice and services to the company's clients. The employee will work with the financial planning team to prepare initial financial strategies to meet clients' objectives based on existing situation of clients.

KEY RESPONSIBILITY:

- Preparation of the Review Packs for existing clients.
- Preparation of Fixed Term Advice Agreements in line with the review schedule for existing client base.
- Preparing the Fee Consent Form.
- Assist with completing the application forms for superannuation, investments, and insurance policies.
- Submission of Third-Party Authorities for new clients to the business and existing clients as part of their ongoing review service.
- Contact product providers to complete research on Investment, Superannuation & Insurance Products.
- Update client database software – using XPLAN and NetSuite.
- Prepare Letters of Engagement for all new clients.
- Contact insurer for updated information.
- Ensure client databases (XPLAN & Netsuite) are kept up to date for new and existing clients of the business.
- Support the Associate Adviser Team in the collation of client data and input of Fact Find information into XPLAN.
- Prepare Tax Packs for all mutual clients of the Wealth Management and Business Services Teams.
- Share research and Insurance policy updates.
- Manage the Wealth Team inbox and distribution of mail to the relevant people/teams.

SKILLS, EXPERIENCE & QUALIFICATIONS

- Bachelor's Degree in Financial related areas, i.e., Business, Commerce, Finance, Accounting
- Excellent verbal and written English skills
- Experience in a financial planning arena / professional services firm is preferred but not essential
- Proficiency in the Microsoft Office applications
- Driven, proactive and able to work independently
- Very strong attention to detail and prioritization skills
- Ability to develop cohesive work environment with team members
- Ability to develop a working knowledge of the Australian Superannuation and taxation system



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AS WHITE OFFERS

- We are experts in offshoring partnerships. This means that you will be a trusted member of the ASW family, and get access to our great benefits, plus you also get to work directly with one of the clients.
- In our unique English-speaking environment, you can practice and enhance your English with peers and international client teams based in either Australia, UK, US or NZ.
- Get global access to Learning & Development programs.
- Great work-life balance.
- Competitive remuneration.
- Excellent medical benefits.
- Great Paid Leave entitlements.
- Company parties/events, future travel opportunities and other exciting activities.
- Ongoing career opportunities.
- To find out what our people say about working at ASW, visit: <https://aswhiteglobal.com/careers/>

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.