



POSITION DESCRIPTION

POSITION TITLE: Administrative Assistant

ADVERT TITLE: Administrative Assistant - Financial Planning

LOCATION: MALAYSIA PHILIPPINES VIETNAM

ASW COMPANY OVERVIEW

ASW is creating the world's most talented international family through hiring and growing talent into long-term careers with Australian companies. ASW is a recruitment and talent specialist, that partners with Australian companies to help them build highly capable international teams. We enable Australian companies to meet their business goals by accessing and retaining premium talent in emerging markets and giving that talent the opportunity to grow, learn and develop. Together we embed international teams into respected Australian businesses, both functionally and culturally, to deliver enduring and transparent people solutions.

THE OPPORTUNITY

Our partner, a boutique Financial Planning firm located in Perth, Australia is growing their team, and looking for an Administrative Assistant - Financial Planning! They are founded in 2019 and aim to provide a highly personalized service with tailored wealth management solutions to clients and require a dedicated team of financial services professionals to support the team.

As the Administrative Assistant - Financial Planning, you must be highly organized and meticulous by nature and has an interest in growing in the Financial Planning industry. This position will be working closely alongside Senior Financial Advisers and Directors of the firm.

KEY RESPONSIBILITIES

- Provide ongoing administrative support to Senior Financial Advisers or Directors of the firm
- Provide exceptional customer service and assist with client inquiries by phone and email
- Prepare documents for client reviews and new client meetings
- Data gathering and client investment/product research
- Implement and file client documentation
- Communicate with a variety of internal and external stakeholders
- Maintain the Xplan client database and ensure accuracy and compliance

SKILLS, EXPERIENCE & QUALIFICATION

- Bachelor's degree in a relevant field



POSITION DESCRIPTION

- Excellent written and verbal communication skills
- Exceptional customer service skills and phone/email management skills
- Highly organized and procedure-driven
- Strong attention to detail and accuracy
- Ability to prioritize workflow and show initiative in a fast-paced environment
- Professional demeanor, enthusiastic and hard-working
- Experience within Financial Planning and Xplan is preferred but not essential

ASW 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.