jva financial services

Position Description
Client Services

Position Objectives
To ensure accurate and timely lodgements of all applications and to liaise with the client professionally to ensure transparency of process.

Direct Manager
Your direct Manager will be the Practice Manager whom you should contact with any queries.

Relationships
You will work closely with the Adviser team to ensure that client outcomes are met in a timely and professional fashion.

Client Service & Communication

- Manage all ongoing & prospective Client communication via phone, mail / e-mail, to ensure Clients are prepared for appointments.
- Keep contact with Clients after adviser meeting &/or participation in a review appointment to ensure Clients clearly understand the next steps.
- Meet & greet all Clients / prospective Clients when they are visiting the business
- Respond to day to day queries from Clients relating to non-advice issues in order to relieve advisers of remedial queries.
- Oversee and prepare all Client applications and facilitate and follow up all lodgements.
- Participate in Client meetings when required to assist Clients with the preparation of applications.
- Prepare Power Point presentations for all existing and new client meetings.

Client Reporting

- Prepare advice documents for meetings (hardcopy & softcopy) and completion of additional information.
- Prepare portfolio reports for existing client accounts.
- Prepare Fact Find for all existing and new clients and ensure information is up to date by utilising completed astute wheel questionnaires, previous Fact Finds.
- Collate Lonsec reports, Tax reports, Centrelink reports

General Support and Administration

- Maintain Client filing in-line with compliance requirements & checklists.
- Photocopying all relevant documentation i.e. birth certificates, share holding certificate etc.
- Monitor and generate Fee Disclosure Statements for all service program clients.
- Reconcile initial and ongoing lodgement registers to ensure correct fees are being received for existing and new business.
- Monitor and action service requests through AMP Planner Portal.

Knowledge

- Good understanding of the financial services industry
- Basic level understanding of all aspects of the financial planning process including:
  - The various entities (companies, trusts, super funds etc.)
  - Gearing
  - Super & Defined Benefit super analysis
  - Retirement planning
  - Social Security analysis
  - Tax minimisation strategies
  - Redundancy planning
  - Risk Analysis & Estate Planning
- Working knowledge of Information Technology requirements and applications

Experience

- Ability to communicate at all levels.
- Communication skills & commitment to performance excellence.
- Commitment to work within clearly defined business processes.
- Ability to quickly learn the features & functionality of appropriate financial planning software & other business systems.

Compliance

- Complete all CPD obligations
- Work in a compliant manner as directed by JVA and AMPFP guidelines
- Conduct compliance reviews of Client files

Education

- Started or able to enrol in Diploma of Financial Planning.
- Exposure to more sophisticated elements of Investment discussion.

Interpersonal Skills

- Ability to work under pressure unsupervised
- Strong interpersonal skills to deal effectively with a wide range of people
- Ability to maintain confidentiality and gain trust from people
- Ability to work in a team
- Strong level of motivation
- Excellent standards

Values

- Complete understanding of fiduciary care
- Uncompromising commitment to the Client
- Honesty and integrity