CLIENT SERVICES COORDINATOR – WEALTH

EMPLOYMENT STATUS ✹ Full Time
REPORTS TO HTA Wealth Director

OVERALL **OBJECTIVE**

To care for and coordinate administrative tasks related to client services across the Wealth business. You have responsibilities in all areas of administration to provide seamless support to the Wealth Director and Team.

KEY AREAS	**Hrs/week**	**%**
Assistant to Wealth Director	7.6	20%
Administration support for Wealth Business	30.4	80%

KEY DUTIES & **RESPONSIBILITIES**

<u>Assistant to Wealth Director</u>

- Provide Administration support to the Wealth Director
- Diary management and coordination of meetings for the Wealth and Finance Director
- Give a friendly, helpful, and welcoming impression to Clients and prospective Clients both in person and over the phone
- Draft and send information requests to clients and follow up on information where required
- Ensure that information and forms received are complete and accurate
- Other administration tasks as required

<u>Administration tasks for Wealth business:</u>

- Greeting clients at the office
- Telephone answering
- Prepare tea and coffees for client meetings
- Enter client data into business software
- Maintaining client files (electronically) as per Wealth protocols
- Management of specific tasks in wealth platform

- Liaise with clients and Akambo for missing information and documents requested
- Send Statement of Advice documents to clients and ensure signed documents are returned
- Assist in the completion of client application forms, rollover forms and redemption requests
- Follow up information outstanding from product providers
- Organise Wealth specific team development sessions as required
- Other Wealth related tasks as required

KEY **RESPONSIBILITIES**

Champion:

- Champion of the following systems/processes:
  - Xplan (client portal)
  - Insurances (excluding Workcover)

Client Relationship Management:

- 24-hour response time to clients
- Build relationships/rapport with clients

Support to HTA Wealth:

- Proactive approach to tasks, diary management
- Effective management of personal and business tasks
- Effective Management of workflow
- 100% on-time completion of tasks in Xplan
- Build ability to manage all risk insurance processes

INDIVIDUAL **QUALITIES**

- Exceptional attention to detail and accuracy
- Excellent written and verbal communication skills
- Confident manner with clients and team members
- Willingness to learn, show initiative and be a positive team player
- Positive and happy attitude
- Highest standard of ethics, confidentiality, and professionalism
- Excellent time management skills
- Common sense approach to tasks
- Responsible and outcome focused

QUALIFICATIONS & **EXPERIENCE**

- Good use of Word, Excel and Outlook
- Experience in a customer service role
- Understanding of basic wealth, accounting and tax terms would be helpful

**Accounting office administration experience highly valued but not essential*

ACCEPTED & AGREED BY

______________________	______________________	Date:
TEAM MEMBER	**DIRECTOR / MANAGER**	