

## Client Services Officer (Wealth)

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Are you looking for an exciting opportunity, full of variety and client contact? Do you have experience working within financial services and are ready for your next challenge? This role may be just for you.

### What we are looking for:

- A client services officer with experience in providing a high level of support and is ready for a role that has a far broader scope, including a lot of client interaction
- Someone who is passionate, highly organised and can provide support to key stakeholders
- Someone wanting to put their support skills to good use and make an impact in a stable, growth focused organisation

### DPM are a leading financial services firm with a unique client base and we pride ourselves on our company culture. We also provide our people with:

- An organisation whose reward/recognition initiatives are ranked in the top 10% in Australia – according to our employees
- A professional services organisation that values its people
- Unbelievable employee benefits like EXTRA annual leave, a Monthly Celebration Day plus loads more...
- A focus on personal learning and development and growth for career progression
- A fantastic office fit-out in a very accessible location (Domain Interchange)

### Reporting to a progressive, energetic and development focused Manager, your normal day includes:

- Providing an exceptional level of service to a professional and high net worth client base
- Supporting a Wealth consultant and ensuring their client base is well maintained
- Appointing, preparing for and coordinating all employee, business and client meetings
- Undertaking a variety of challenging support responsibilities that makes everything just work perfectly!

### But there is a catch. You should have:

- Solid experience (minimum 2 years) in a similar role (financial services desirable)
- Proficient in the Microsoft Office Suite i.e. Excel, Word and Outlook
- Excellent communication skills (written and verbal)
- Demonstrated ability to plan, organise and prioritise
- Team player with demonstrated leadership capability
- High level of initiative and exceptional attention to detail
- Preferably RG146 (or willingness to study)
- Xplan knowledge (highly desirable)

### Interested?

Send us your CV and a cover letter that 'wows' us to [careers@dpm.com.au](mailto:careers@dpm.com.au).

Position Details	
<b>Title</b>	<b>Client Services Officer – Wealth</b>
<b>Division</b>	Advice
<b>Leader</b>	Manager Advice Operations
<b>Time Fraction</b>	Full-time/Permanent
<b>Reviewed Date</b>	March 2018
<b>Benchmarking</b>	Administration - Intermediate
Position Overview	
The Client Services Officer provides administrative support to the Private Wealth team to ensure seamless provision of advice and customer service.	
What does 'Good' look like for this role?	
<ul style="list-style-type: none"> <li>• Client service was of a high standard and at the forefront of behaviours/actions</li> <li>• The Consultant's time was adequately managed with appointments/meetings/priorities</li> <li>• Client related information and data was maintained correctly/accurately</li> <li>• Completed work had minimal errors and was delivered in a timely manner</li> <li>• Processes, software usage, calculations and analytics were carried accurately, efficiently and effectively</li> <li>• Contributed to the overall operations and continuous improvement of the Advice Operations team</li> </ul>	
Position Responsibilities	
<b>Support &amp; Administration</b>	<ul style="list-style-type: none"> <li>• Support Consultants in co-ordination of client meetings as well as preparation and provision of client research material and investment advice</li> <li>• Manage communications on behalf of Consultant(s) e.g. emails, mail, calls and voicemail</li> <li>• Provide word processing support e.g., memos, minutes, reports</li> <li>• Collate and distribute client documentation this includes but not limited to: Statement of Advice (SOA), Records of Advice (ROA), Authority to Proceed (ATP),</li> <li>• Produce the following documentation: Client Questionnaire (CQ), Invoices, Service and Pricing (S&amp;P), Assets and Liabilities (A&amp;L), Application forms, Opt In, client reviews</li> <li>• Assist with implementation of strategies and follow through to ensure accurate &amp; timely completion</li> <li>• Contact third party stakeholders to obtain/update client information</li> </ul>
<b>Client Support</b>	<ul style="list-style-type: none"> <li>• Providing efficient and courteous service to all client and key stakeholders.</li> <li>• Coordinate the client appointment booking process (phone, email or online booking system)</li> <li>• Follow up Consultant(s) post meetings to ensure action items are noted/followed through</li> <li>• Produce /distribute client communications in regard to completed implementation</li> </ul>
<b>Team, Software and Process</b>	<ul style="list-style-type: none"> <li>• Management of all files, documentation and client information on CRM systems (xplan, myob, and SEED) to ensure high standard of internal compliance.</li> <li>• Assist with reviewing, developing and documenting Xplan workflow processes (Threads) in conjunction with Manager Advice Operations and/or Business Analyst</li> <li>• Proactively contribute at team meetings &amp; support the team as required</li> </ul>
<b>General</b>	<ul style="list-style-type: none"> <li>• Maintain industry and technical knowledge</li> <li>• Ensure work practices are conducted in accordance with DPM's values and compliance requirements</li> </ul>
Qualifications/Experience/Skills	
<ul style="list-style-type: none"> <li>• Solid experience (minimum 2 years) in a similar role (financial services desirable)</li> <li>• Preferably RG146 (or willingness to study)</li> <li>• Proficient in the Microsoft Office Suite i.e. Excel, Word and Outlook</li> <li>• Xplan knowledge (highly desirable)</li> <li>• Excellent communication skills (written and verbal)</li> <li>• Demonstrated ability to plan, organise and prioritise</li> <li>• Team player with demonstrated leadership capability</li> <li>• High level of initiative and exceptional attention to detail</li> </ul>	