



Client Services Officer (Insurance)

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 loves helping
- Someone wanting to put their support skills to good use and make an impact in a stable, growth focused organisation
- Someone wanting to learn, grow and develop

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:

- 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

Working with progressive, energetic and development focused Advisors, your normal day includes:

- Helping your Adviser provide an exceptional level of service to a professional and high net worth client base
- Preparing for and coordinating client meetings
- Liaising with financial institutions and other business entities.
- Maintaining client information and general administration tasks
- Undertaking a variety of challenging support responsibilities that makes everything just work perfectly!

But there is a catch. You should have:

- Enthusiasm and initiative
- Solid experience (minimum 2 years) in a similar role (financial services/ insurance industry experience desirable)
- Strong attention to detail and highly organised
- 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
- Preferably RG146 (or willingness to study)
- Xplan knowledge (highly desirable)

Interested?

To apply for this great opportunity, please submit an application through the Seek portal:

https://www.seek.com.au/job/37920916?_ga=2.29821887.1600094140.1544490592-1493082742.1509334705

To be eligible to apply, you must be an Australian Citizen or Permanent Resident.

If you have any further questions about the role, you can call our People & Development team on (03) 9621 7025.

Please note only those candidates that 'wow' us will be contacted!

Position Overview



Position Details	
Title	Client Services Officer (Insurance)
Division	Advice Operations
Leader	Manager Advice Operations
Time Fraction	Full-time/Permanent
Position Overview	
The Client Services Officer provides high level support to an Insurance Consultant and their client base.	
DPM Values	
Everyone at DPM is expected to perform their role and conduct themselves in line with DPM's values: Teamwork / Collaborating as one Accountability / Owing our actions Expertise / Providing innovative solutions Recognition / Valuing our people and clients Integrity / Acting with honesty, fairness and respect Passion / Enjoying everything we do!	
Position Responsibilities	
Organisation	<ul style="list-style-type: none"> • Coordinate Consultant(s) calendar to resolve conflicts and exercise judgement on priorities • Manage and produce communications on behalf of Consultant e.g. emails, mail, calls and voicemail • Provide word processing support e.g., file notes, memos, minutes, reports
Client and Meeting Support	<ul style="list-style-type: none"> • Provide exceptional client service EVERY time! • Contact clients as required to schedule appointments, collect additional information, respond to enquiries, follow up on outstanding paperwork or when requested by consultant • Coordinate the client appointment booking process (phone or email) • Follow up Consultant(s) post meetings to ensure action items are noted/followed through • Ensure Consultant(s) office/meeting rooms are clean and tidy after all meetings
Advice Support	<ul style="list-style-type: none"> • Coordinate/implement end to end advice process for clients (in partnership with Consultant) • Work with Consultant to develop/action targeted approaches to service existing/secure new clients • Obtain client information from external/internal sources to assist in pre-meeting planning • Collate information required to facilitate development of Statement of Advice documentation • Liaise with paraplanning team to facilitate/track production of advice documents • Ensure client information/documentation is stored/scanned correctly in the system (MYOB) • Complete applications including pre/post requirements and general product queries (e.g. liaising with providers/underwriting teams, preparing quotes, helping clients complete application forms) • Arrange any relevant underwriting requirements; medicals, questionnaires, financials, etc • Liaise with relevant stakeholders to obtain information to assist with application completions • Ensure regular reviews are scheduled and tracked and Consultant is up-to-date on reviews due
General	<ul style="list-style-type: none"> • Maintain relevant spreadsheets to update Consultant with progress against budget/KPI's • Provide policy information to accountants and other internal stakeholders as requested • Liaise with insurance companies to obtain policy information • Obtain insurance product research material from the IRESS system • Provide reception relief support (where required)
Qualifications/Experience/Skills	
<ul style="list-style-type: none"> • Solid experience (minimum 3 years) in similar role (financial services desirable) • Advanced coordination/administrative skills • 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 • Thorough understanding of risk insurance • Demonstrated ability to keep accurate records and reports • Sound knowledge of day to day work flow systems 	